
Welcome to the Vaccine Management System!



ARIZONA DEPARTMENT
OF HEALTH SERVICES

Table of Contents

Creating and Accessing Admin Portal Account	3
Adding an OU Admin - Applies to State Admins only	4
Adding Staff to the System	6
Adding Call Center Staff to the System - Applies to OU Admins only	9
Adding and Maintaining Sites	11
Adding Inventory to a Site	15
Exporting Site Inventory	18
Adding and Maintaining Vaccine Programs	19
Adding an Event	26
Assigning Staff to an Event	35
Private Event	37
Follow up Event	40
Export	42
Offline Upload	44
Publishing an Event	46
Search for an Event	47
Edit a Patient's Record and View/Download Vaccination Records	49
Appendix	56
PATIENT BULK UPLOAD INSTRUCTIONS	56
STAFF BULK UPLOAD INSTRUCTIONS	57
CALL CENTER STAFF BULK UPLOAD INSTRUCTIONS	58

— Purpose —

The purpose of this User Guide is to provide detailed information for Organization and Site administrators to carry out the tasks and responsibilities of their roles.

— Overview —

The primary responsibilities of the Organization Admin are to add and maintain Sites, Staff, Events and Vaccine Programs at the organization level. The Site Admin has similar responsibilities at the site level. Two notable differences between the roles:

- Site Admins will not add or manage Organization Admins.
- Site Admins will manage only Sites and Events assigned to them.

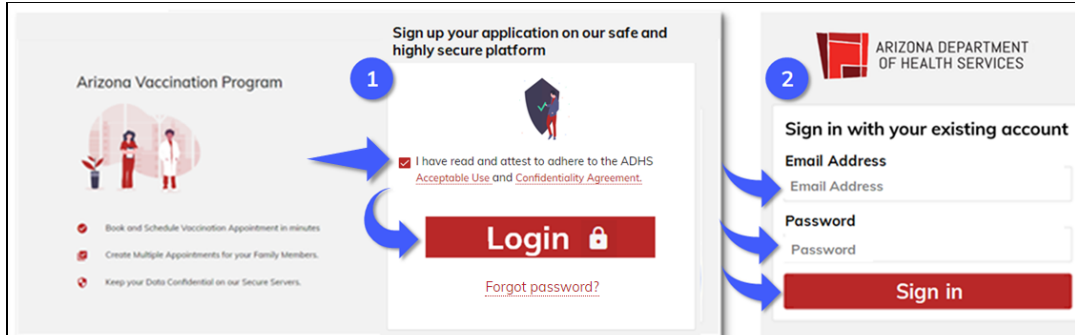
The Organization Admin is responsible for configuring the system and providing oversight across all areas or regions within their organization. The Organization Admin also has the ability to manage user accounts and roles across the organization.

— Portal Baseline Features —

- Logging into the Admin Portal
- Add OU Admins
- Add Staff Members
- Add Call Center Staff
- Edit Patient Records
- Add/Maintain Sites
- Allocate Inventory to a Site
- Add/Maintain Vaccine Programs
- Create and Manage Events
- Assign Staff to an Event
- Follow up Event
- Exports

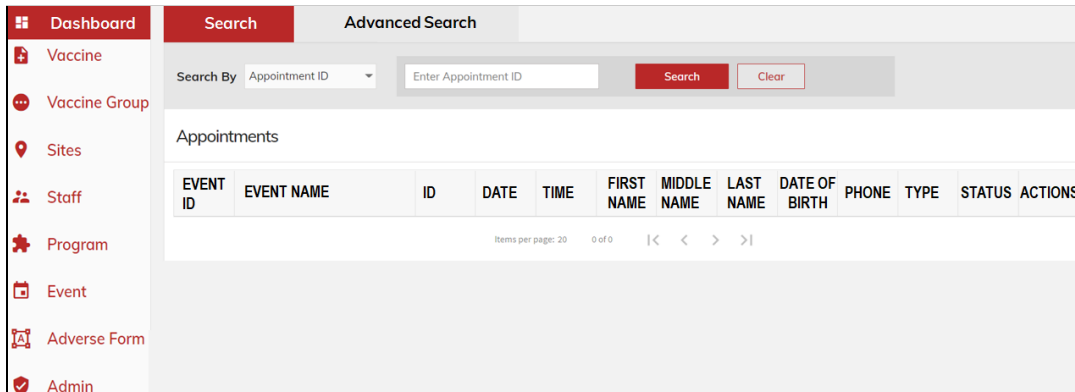
Creating and Accessing Admin Portal Account

1. From the Login screen, check the box to confirm you understand and will comply with confidentiality and acceptable use rules and click Login.
2. Log into the Admin Portal using the staff credentials sent to your registered email address.

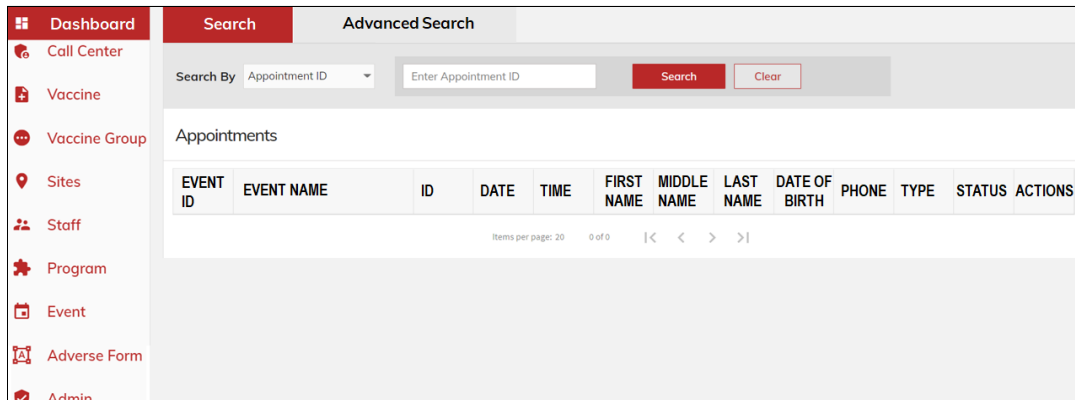


When a user logs in as a **Site Administrator**, the Dashboard screen will display. You will navigate through the system using the menu on the left side of the screen.

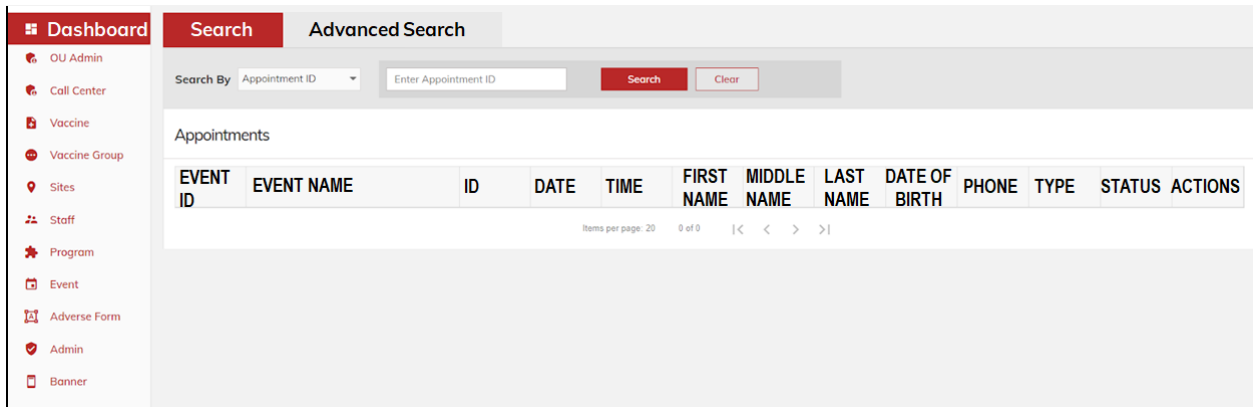
Note: A site administrator will only be able to look up records unless granted access to edit records.



When a user logs in as an **Organization Unit (OU) Administrator**, the Dashboard screen will display. You will navigate through the system using the menu on the left side of the screen.



When a user logs in as a **State Organization Unit (OU) Administrator (State Admin)**, the Dashboard screen will display. You will navigate through the system using the menu on the left side of the screen.



Dashboard | **Search** | **Advanced Search**

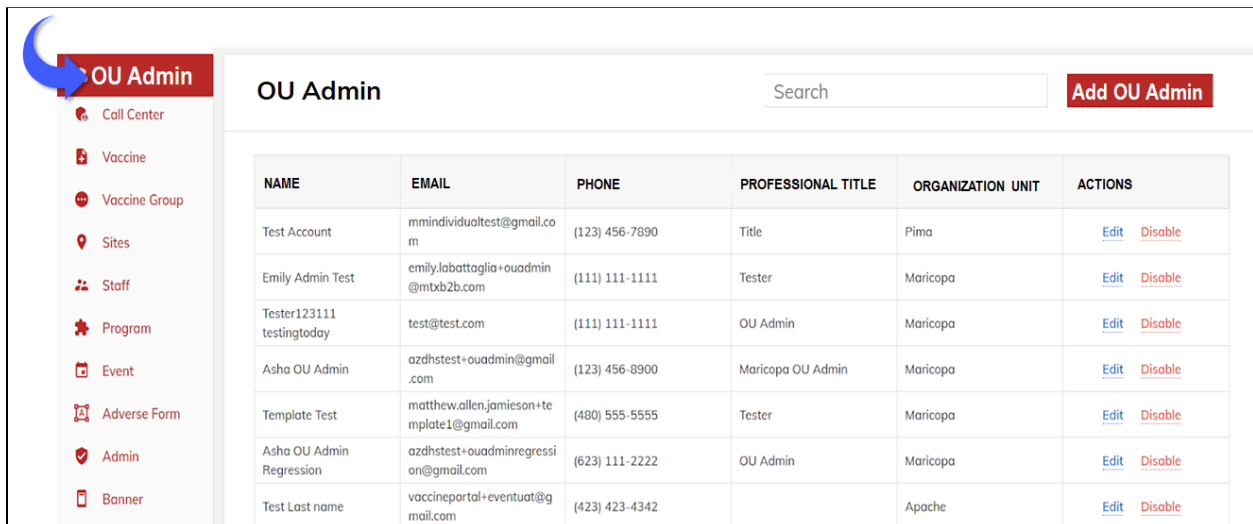
Search By: Appointment ID | Enter Appointment ID | Search | Clear

Appointments

EVENT ID	EVENT NAME	ID	DATE	TIME	FIRST NAME	MIDDLE NAME	LAST NAME	DATE OF BIRTH	PHONE	TYPE	STATUS	ACTIONS
Items per page: 20 0 of 0 < < > >												

Adding an OU Admin – Applies to State Admins only

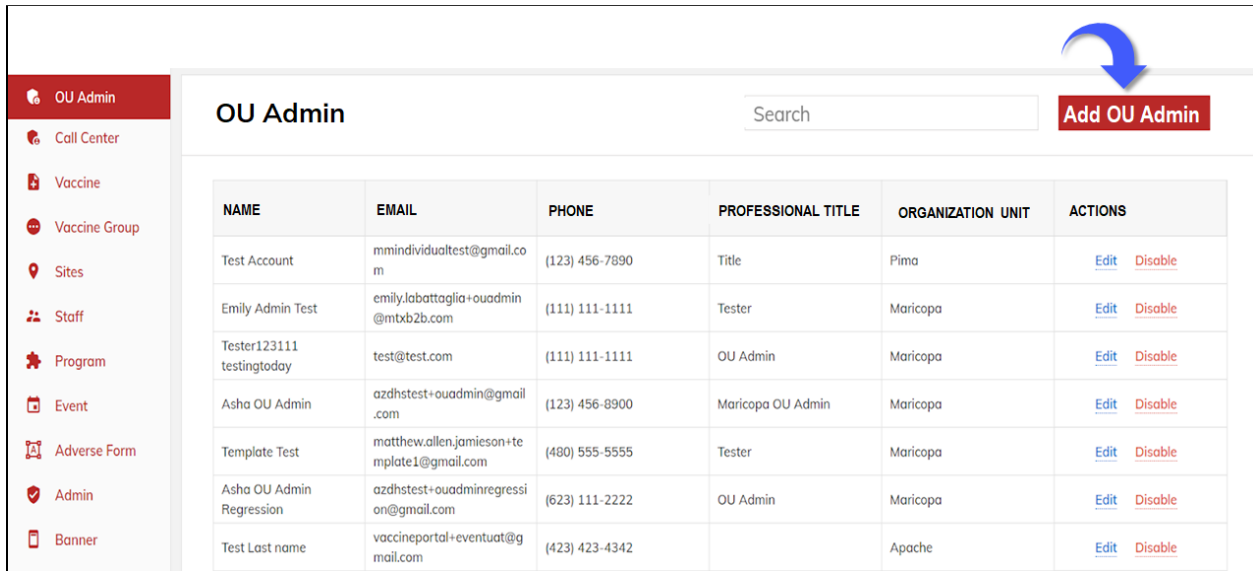
1. Click the **OU Admin** tab on the left menu bar. All OU Admins added will display on the table.



OU Admin | Search | Add OU Admin

NAME	EMAIL	PHONE	PROFESSIONAL TITLE	ORGANIZATION UNIT	ACTIONS
Test Account	mmindivualtest@gmail.com	(123) 456-7890	Title	Pima	Edit Disable
Emily Admin Test	emily.labattaglia+ouadmin@mtxb2b.com	(111) 111-1111	Tester	Maricopa	Edit Disable
Tester123111 testingtoday	test@test.com	(111) 111-1111	OU Admin	Maricopa	Edit Disable
Asha OU Admin	azdhstest+ouadmin@gmail.com	(123) 456-8900	Maricopa OU Admin	Maricopa	Edit Disable
Template Test	matthew.allen.jamieson+template1@gmail.com	(480) 555-5555	Tester	Maricopa	Edit Disable
Asha OU Admin Regression	azdhstest+ouadminregression@gmail.com	(623) 111-2222	OU Admin	Maricopa	Edit Disable
Test Last name	vaccineportal+eventuat@gmail.com	(423) 423-4342		Apache	Edit Disable

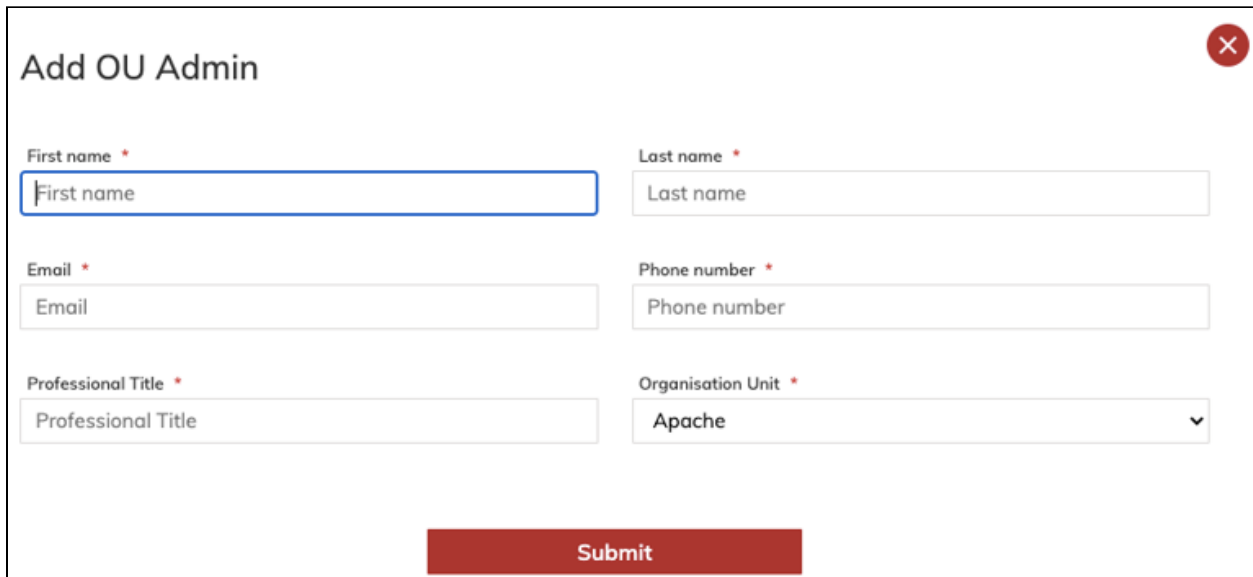
- To add a new OU Admin, click **Add OU Admin**.



The screenshot shows the 'OU Admin' management page. On the left is a sidebar with navigation links: OU Admin, Call Center, Vaccine, Vaccine Group, Sites, Staff, Program, Event, Adverse Form, Admin, and Banner. The main content area has a search bar and an 'Add OU Admin' button. Below this is a table listing existing OU Admins.

NAME	EMAIL	PHONE	PROFESSIONAL TITLE	ORGANIZATION UNIT	ACTIONS
Test Account	mmindividualtest@gmail.com	(123) 456-7890	Title	Pima	Edit Disable
Emily Admin Test	emily.labattaglia+ouadmin@mtxb2b.com	(111) 111-1111	Tester	Maricopa	Edit Disable
Tester123111 testingtoday	test@test.com	(111) 111-1111	OU Admin	Maricopa	Edit Disable
Asha OU Admin	azdhstest+ouadmin@gmail.com	(123) 456-8900	Maricopa OU Admin	Maricopa	Edit Disable
Template Test	matthew.allen.jamieson+template1@gmail.com	(480) 555-5555	Tester	Maricopa	Edit Disable
Asha OU Admin Regression	azdhstest+ouadminregression@gmail.com	(623) 111-2222	OU Admin	Maricopa	Edit Disable
Test Last name	vaccineportal+eventuat@gmail.com	(423) 423-4342		Apache	Edit Disable

- Complete all the fields on the screen. Once completed, click **Submit** to save the new OU Admin entry.



The 'Add OU Admin' form is displayed with a close button (X) in the top right corner. It contains the following fields:

- First name ***: Text input field with placeholder 'First name'.
- Last name ***: Text input field with placeholder 'Last name'.
- Email ***: Text input field with placeholder 'Email'.
- Phone number ***: Text input field with placeholder 'Phone number'.
- Professional Title ***: Text input field with placeholder 'Professional Title'.
- Organisation Unit ***: Dropdown menu with 'Apache' selected and a downward arrow.

A red **Submit** button is located at the bottom center of the form.

- The newly added OU Admin will display on the table. To find an admin record, enter their name in the Search field. To sort any of the columns, click the column header.

You can edit member details (except the email) as needed. Click Edit to update the fields. Click Disable to disable an account.

OU Admin					
			Search	Add OU Admin	
NAME	EMAIL	PHONE	PROFESSIONAL TITLE	ORGANIZATION UNIT	ACTIONS
New Admin	New.Admin@email	(555) 123-4567	Apache Org Admin	Apache	Edit Disable

Adding Staff to the System

- Click the **Staff** tab on the left menu bar. All staff members previously entered into the system will display on the table.

Staff						
			Search	Add Staff		
NAME	EMAIL	PHONE	PROFESSIONAL TITLE	DESIGNATION	ACTIONS	
Capital mall Site Admin	vaccineportal+maricopasiteadmin@gmail.com	(122) 323-2323	Maricopa Site admin	Site Admin	Edit	Disable
Emily MaricopaTest	emily.labattaglia+maricopauat@mtxb2b.com	(111) 111-1111	tester	Site Admin	Edit	Disable
Joe Doe	vaccineportal+joe@gmail.com	(541) 754-3010	Nurse	Clinician	Edit	Disable
Emily Maricopa	emily.labattaglia+maricopa@mtxb2b.com	(111) 111-1111	tester	Staff	Edit	Disable
Ravi RN Pitti	pittir@azdhs.gov	(321) 654-9870	RN	Clinician	Edit	Disable

- To add staff, **click Add Staff**.

Staff						
			Search	Add Staff		
NAME	EMAIL	PHONE	PROFESSIONAL TITLE	DESIGNATION	ACTIONS	
Capital mall Site Admin	vaccineportal+maricopasiteadmin@gmail.com	(122) 323-2323	Maricopa Site admin	Site Admin	Edit	Disable
Emily MaricopaTest	emily.labattaglia+maricopauat@mtxb2b.com	(111) 111-1111	tester	Site Admin	Edit	Disable
Joe Doe	vaccineportal+joe@gmail.com	(541) 754-3010	Nurse	Clinician	Edit	Disable
Emily Maricopa	emily.labattaglia+maricopa@mtxb2b.com	(111) 111-1111	tester	Staff	Edit	Disable
Ravi RN Pitti	pittir@azdhs.gov	(321) 654-9870	RN	Clinician	Edit	Disable

- Complete all the fields for each staff member. Once entered, **click Submit**.

An email will be sent inviting the staff member to register for the portal.

Staff Details

First name *

Last name *

Email *

Phone number *

Professional Title *

Role *

Select a Role

Submit

The newly added staff member will display on the table. To find a staff record, enter their name in the Search field. To sort any of the columns, click the column header.

You can edit member details (except the email) as needed. Click Edit to update the fields. Click Disable to disable an account.

Call Center

Vaccine

Vaccine Group

Sites

Staff

Program

Event

Adverse Form

Admin

Staff

Search

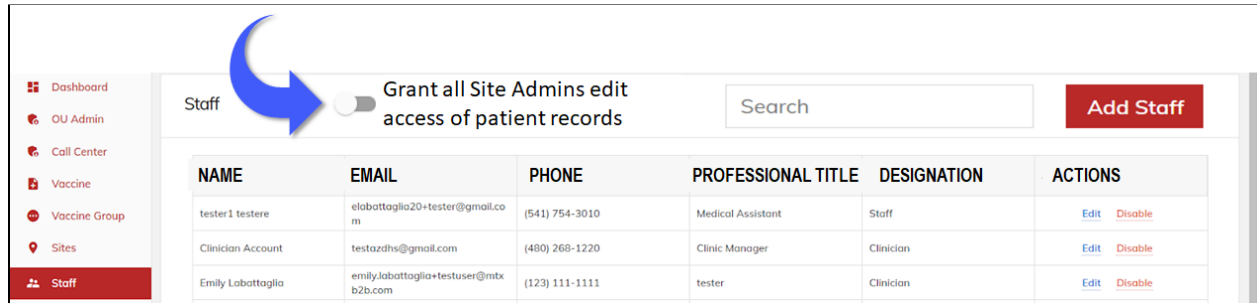
Add Staff

NAME	EMAIL	PHONE	PROFESSIONAL TITLE	DESIGNATION	ACTIONS
New Staff	New.staff@email	(555) 123-4567	Clinic Supervisor	Staff	Edit Disable
Emily MaricopaTest	emily.labattaglia+maricopauat@mtxb2b.com	(111) 111-1111	tester	Site Admin	Edit Disable
Joe Doe	vaccineportal+joe@gmail.com	(541) 754-3010	Nurse	Clinician	Edit Disable
Emily Maricopa	emily.labattaglia+maricopa@mtxb2b.com	(111) 111-1111	tester	Staff	Edit Disable
Ravi RN Pitti	pittir@azdhs.gov	(321) 654-9870	RN	Clinician	Edit Disable

Granting access to edit patient records - Applies to State Admins only

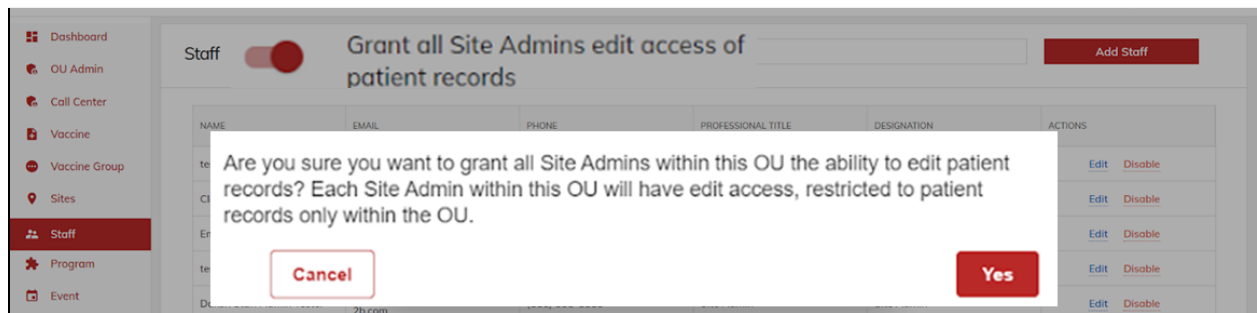
State Admins will have the option to grant all Site Admins within an OU access to edit patient records.

1. Click the toggle/button to enable edit access.

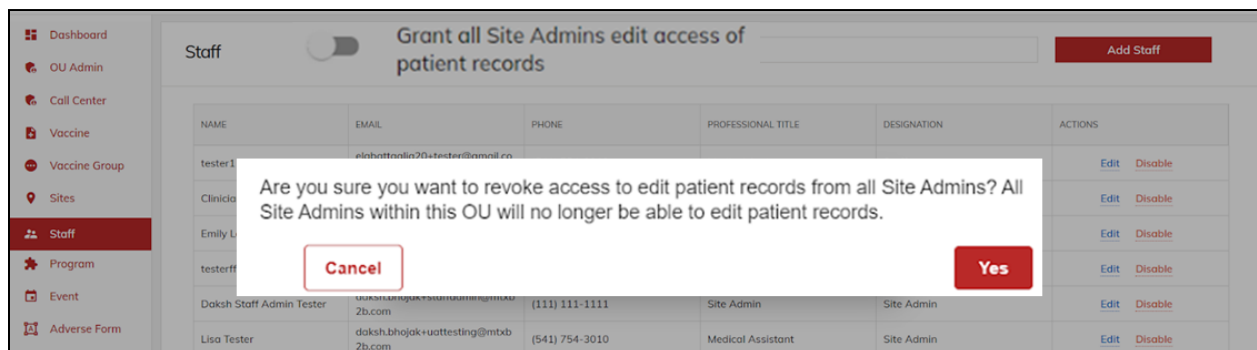


A pop-up will display asking if you're sure you want to grant all Site Admins within the OU the ability to edit patient records.

2. Click Yes to enable edit access.



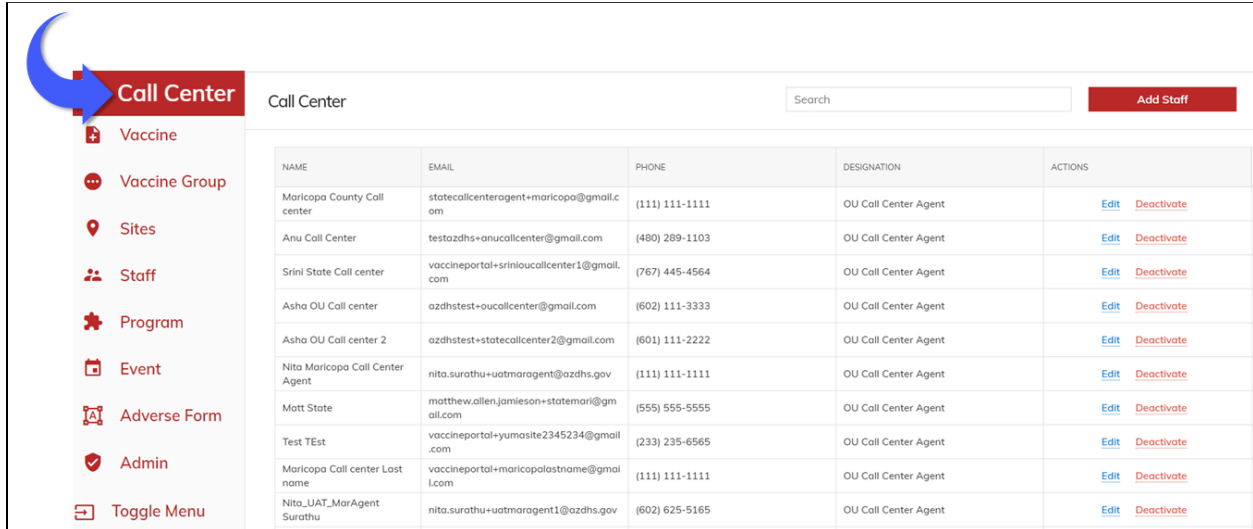
If access needs to be removed from Site Admins, click the toggle/button. A pop-up will display asking if you are sure you want to revoke access to edit patient records from all Site Admins. Click Yes to remove access.



Click here to view [Staff Bulk Upload Instructions](#).

Adding Call Center Staff to the System – Applies to OU Admins only

1. Click the **Call Center** tab on the left menu bar. All Call Center Staff previously entered into the system will display on the table.



Call Center

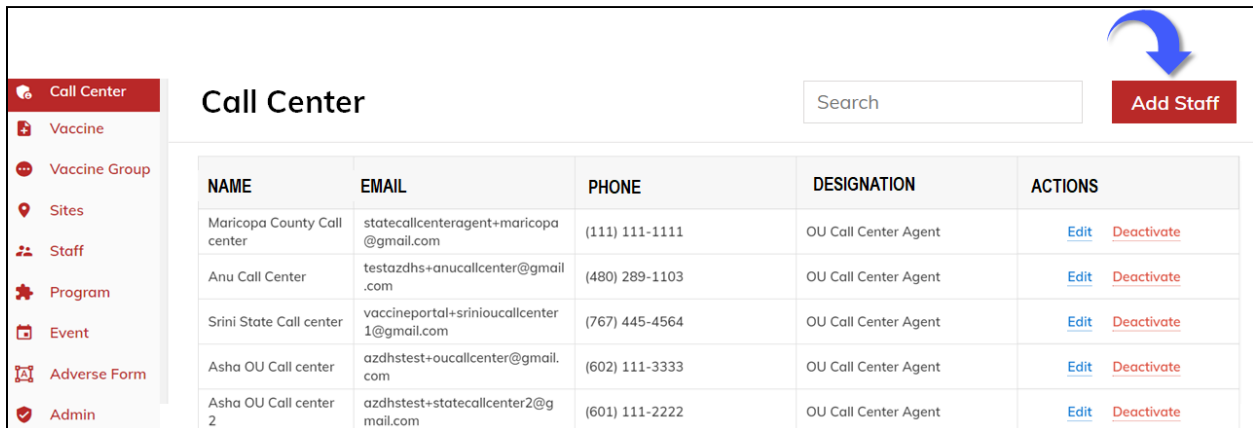
Search

Add Staff

NAME	EMAIL	PHONE	DESIGNATION	ACTIONS
Maricopa County Call center	statecallcenteragent+maricopa@gmail.com	(111) 111-1111	OU Call Center Agent	Edit Deactivate
Anu Call Center	testazdhs+anucallcenter@gmail.com	(480) 289-1103	OU Call Center Agent	Edit Deactivate
Srini State Call center	vaccineportal+srinioucallcenter1@gmail.com	(767) 445-4564	OU Call Center Agent	Edit Deactivate
Asha OU Call center	azdhstest+oucallcenter@gmail.com	(602) 111-3333	OU Call Center Agent	Edit Deactivate
Asha OU Call center 2	azdhstest+statecallcenter2@gmail.com	(601) 111-2222	OU Call Center Agent	Edit Deactivate
Nita Maricopa Call Center Agent	nita.surathu+uatmaragent@azdhs.gov	(111) 111-1111	OU Call Center Agent	Edit Deactivate
Matt State	matthew.allen.jamieson+statemari@gmail.com	(555) 555-5555	OU Call Center Agent	Edit Deactivate
Test TEst	vaccineportal+yumasite2345234@gmail.com	(233) 235-6565	OU Call Center Agent	Edit Deactivate
Maricopa Call center Last name	vaccineportal+maricopalastrname@gmail.com	(111) 111-1111	OU Call Center Agent	Edit Deactivate
Nita_UAT_MarAgent Surathu	nita.surathu+uatmaragent1@azdhs.gov	(602) 625-5165	OU Call Center Agent	Edit Deactivate

2. To add a new Call Center Staff, click on **Add Staff**.

Note: Call center staff will have access to schedule into all events within the OU.



Call Center

Search

Add Staff

NAME	EMAIL	PHONE	DESIGNATION	ACTIONS
Maricopa County Call center	statecallcenteragent+maricopa@gmail.com	(111) 111-1111	OU Call Center Agent	Edit Deactivate
Anu Call Center	testazdhs+anucallcenter@gmail.com	(480) 289-1103	OU Call Center Agent	Edit Deactivate
Srini State Call center	vaccineportal+srinioucallcenter1@gmail.com	(767) 445-4564	OU Call Center Agent	Edit Deactivate
Asha OU Call center	azdhstest+oucallcenter@gmail.com	(602) 111-3333	OU Call Center Agent	Edit Deactivate
Asha OU Call center 2	azdhstest+statecallcenter2@gmail.com	(601) 111-2222	OU Call Center Agent	Edit Deactivate

- Complete all the fields on the screen. Once completed, click **Submit** to save the new Call Center Staff entry. The call center staff will receive an email to register for the portal.

Add Call Center Staff

First name *

Last name *

Email *

Phone number *

Role *

Organisation Unit *

Submit

The newly added call center staff member will display on the table. To find a staff record, enter their name in the Search field. To sort any of the columns, click the column header.

You can edit member details (except the email) as needed. Click Edit to update the fields. Click Disable to disable an account.

Call Center

Vaccine

Vaccine Group

Sites

Staff

Program

Event

Adverse Form

Admin

Call Center

Search

Add Staff

NAME	EMAIL	PHONE	DESIGNATION	ACTIONS
New Call Center	New.staff@email	(555) 123-4567	OU Call Center Agent	Edit Disable
Anu Call Center	testazdhs+anucallcenter@gmail.com	(480) 289-1103	OU Call Center Agent	Edit Deactivate
Srini State Call center	vaccineportal+srioiucallcenter1@gmail.com	(767) 445-4564	OU Call Center Agent	Edit Deactivate
Asha OU Call center	azdhstest+oucallcenter@gmail.com	(602) 111-3333	OU Call Center Agent	Edit Deactivate
Asha OU Call center 2	azdhstest+statecallcenter2@gmail.com	(601) 111-2222	OU Call Center Agent	Edit Deactivate

Adding and Maintaining Sites

- Click the **Sites** tab on the left menu bar.

OU Admin

Call Center

Vaccine

Vaccine Group

Sites

Staff

Program

Event

Adverse Form

Admin

Banner

Sites

Search

Add Site

NAME	TELEPHONE NUMBER	EMAIL	BUSINESS HOURS
Test Site	(111) 111-1111	vms@azdhs.gov	7:00 AM - 5:00 PM
State or Arizona Test Site	(111) 111-1111	vms@azdhs.gov	12:00 PM - 11:59 PM

1 - 2 of 2 |< < > >|

- To add a new Site, click **Add Site**.

OU Admin

Call Center

Vaccine

Vaccine Group

Sites

Staff

Program

Event

Adverse Form

Admin

Banner

Sites

Search

Add Site

NAME	TELEPHONE NUMBER	EMAIL	BUSINESS HOURS
Test Site	(111) 111-1111	vms@azdhs.gov	7:00 AM - 5:00 PM
State or Arizona Test Site	(111) 111-1111	vms@azdhs.gov	12:00 PM - 11:59 PM

1 - 2 of 2 |< < > >|



- Complete all of the required fields in the Clinic Details screen. Required fields are marked with a red asterisk (*). Scroll down to complete all fields.

See below for a note on responding to the question, “Is the site inventory state allocated (ASIIS pin is required for state allocated Inventory)”.

Entering the location into the Search Address field will autofill the address information.

Once complete, scroll down and click **Submit**.

Site Details

Site Name *

IRMS ASIIS OU admin

ASIIS IRMS ID *

69159

Email *

vaccineportal+glendaleevent@gmail.com

Business Start Time *

06:30 AM

Search Address

Enter a location

Address *

4041 N Central Ave, Phoenix, AZ 85012, USA

Street

Street

Suite/Apt

Suite/Apt

State *

AZ

Description

Description

Is the site inventory state allocated (ASIIS pin is required for state allocated inventory)? *

Yes

☒ No

ASIIS Facility ID *

SIISCLIENT85673

Phone Number *

(425) 454-5454

Business End Time *

06:00 PM

City *

Phoenix

County *

County

Zip Code *

85007

Submit

Note: When responding to the question, 'Is the site inventory state allocated (ASIIS pin is required for state allocated inventory)? Yes/No:

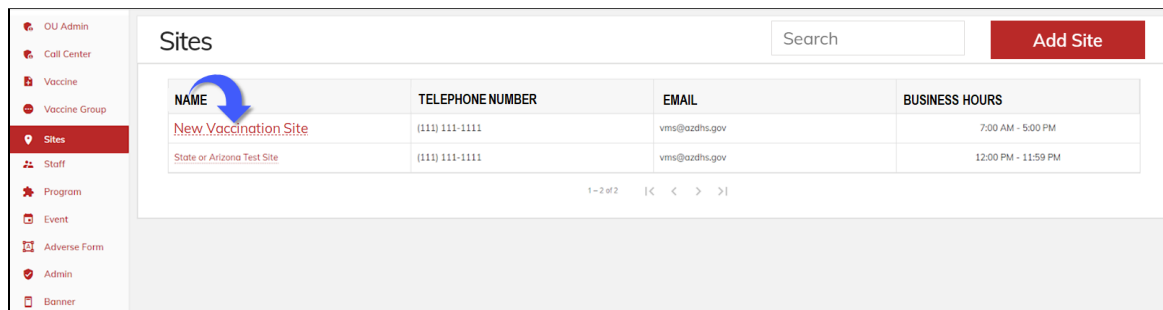
If yes is selected, the ASIIS pin needs to be entered.

<p>Site Name *</p> <input type="text"/>	<p>Is the site inventory state allocated (ASIIS pin is required for state allocated inventory)? *</p> <p><input checked="" type="radio"/> Yes <input type="radio"/> No</p>
<p>ASIIS Pin *</p> <input type="text"/>	

If no is selected, the ASIIS IRMS & ASIIS Facility ID needs to be entered.


<p>Site Name *</p> <input type="text"/>	<p>Is the site inventory state allocated (ASIIS pin is required for state allocated inventory)? *</p> <p><input type="radio"/> Yes <input checked="" type="radio"/> No</p>
<p>ASIIS IRMS ID *</p> <input type="text"/>	<p>ASIIS Facility ID *</p> <input type="text"/>

- The newly added Site will display on the Sites table. To view details for a site that has been entered, click on the site name in the Name column.



NAME	TELEPHONE NUMBER	EMAIL	BUSINESS HOURS
New Vaccination Site	(111) 111-1111	vms@azdhs.gov	7:00 AM - 5:00 PM
State or Arizona Test Site	(111) 111-1111	vms@azdhs.gov	12:00 PM - 11:59 PM

- The site will display as in the screenshot below. To update any site details, click the **Clinic Info** tab and click **Edit**.

<p>Clinic Info Inventory Site Admin</p> <p>New Vaccination Site</p> <p>Whatever is entered in the Description field will display here</p> <p>Timings: 11:00 AM - 4:39 PM</p> <p>Contact: (480) 111-2222</p> <p>Email: azdhstest+ouadminregression@gmail.com</p> <p>Address: 150 W Adams St, Phoenix, Arizona, United States, 85007</p> <p>Edit</p>	 <p>150 W Adams St, Phoenix, Arizona, United States, 85007</p>
--	--



5. The screen below will display. Edit the fields you want to change, then scroll down to click **Submit** to save.

Site Details

Site Name *

IRMS ASIIS OU admin

Is the site inventory state allocated (ASIIS pin is required for state allocated inventory)? *

☐ Yes ☒ No

ASIIS IRMS ID *

69159

ASIIS Facility ID *

SIISCLIENT05673

Email *

vaccineportal+glendaleevent@gmail.com

Phone Number *

(425) 454-5454

Business Start Time *

06:30 AM

Business End Time *

06:00 PM

Search Address

Enter a location

Address *

4041 N Central Ave, Phoenix, AZ 85012, USA

Street

Street

City *

Phoenix

Suite/Apt

Suite/Apt

County *

County

State *

AZ

Zip Code *

85007

Description

Description

Submit

Each Site will display an **Inventory tab**. You have the ability to monitor inventory levels, download exports, as well as add new inventory for the specified Site.

Adding inventory to a Site is covered in the next section [Adding Inventory to a Site](#).

Clinic Info

Inventory

Site Admin

Stock Details

Search

Export Data

Add New +

NAME	LOT NUMBER	LOT STATUS	EXPIRATION DATE	ACTION
Moderna COVID-19	321	Active	01-31-2021	Edit
Pfizer-BioNTech COVID-19	123	Active	01-31-2021	Edit

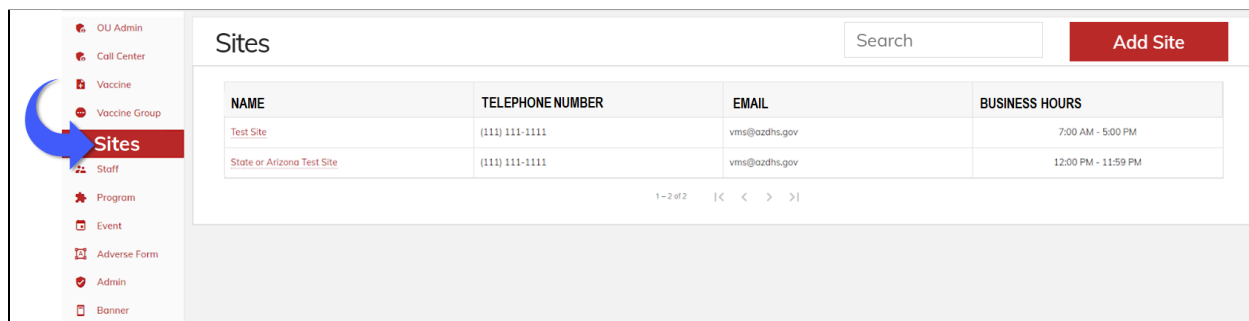
Under the **Site Admin** tab, you will be able to view all of the Staff that has been assigned a site admin for a particular Site.

Assigning Staff to an Event is covered in the section [Adding an Event](#).

Clinic Info	Inventory	Site Admin	
Site Admin			
NAME	EMAIL	PHONE	PROFESSIONAL TITLE
Test regression Staff	vaccineportal+regstaff569966@gmail.com	(121) 221-2121	Site Admin
Mari 5 Clinician minus three	vaccineportal+maricopareg6clinician@gmail.com	(541) 754-3456	Nurse

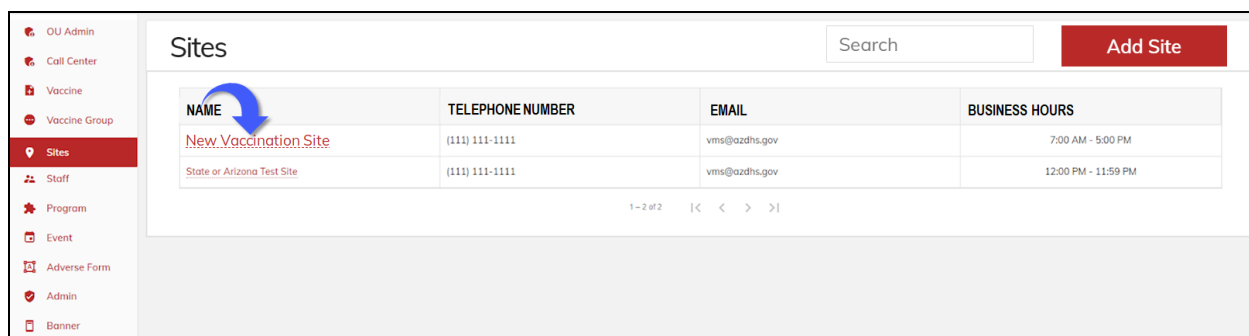
Adding Inventory to a Site

1. Click the **Sites** tab on the left menu bar.



NAME	TELEPHONE NUMBER	EMAIL	BUSINESS HOURS
Test Site	(111) 111-1111	vms@azdhs.gov	7:00 AM - 5:00 PM
State or Arizona Test Site	(111) 111-1111	vms@azdhs.gov	12:00 PM - 11:59 PM

2. Click on the site you would like to add inventory to.



NAME	TELEPHONE NUMBER	EMAIL	BUSINESS HOURS
New Vaccination Site	(111) 111-1111	vms@azdhs.gov	7:00 AM - 5:00 PM
Test Site	(111) 111-1111	vms@azdhs.gov	7:00 AM - 5:00 PM
State or Arizona Test Site	(111) 111-1111	vms@azdhs.gov	12:00 PM - 11:59 PM



- Click on the **Inventory** tab for the site.

NAME	LOT NUMBER	LOT STATUS	EXPIRATION DATE	ACTION
Moderna COVID-19	321	Active	01-31-2021	Edit
Pfizer-BioNTech COVID-19	123	Active	01-31-2021	Edit

- To add new Inventory, click **Add New**.

NAME	LOT NUMBER	LOT STATUS	EXPIRATION DATE	ACTION
Moderna COVID-19	321	Active	01-31-2021	Edit
Pfizer-BioNTech COVID-19	123	Active	01-31-2021	Edit

- Click the Vaccine dropdown to select the Vaccine and enter all of the required fields. Required fields are marked with a red asterisk (*).

You can mark the lot number as either active or inactive under status (inventory not in use can be marked as inactive so it does not display in the clinician portal). Once complete, scroll down and click **Submit**.

Vaccine Details

Vaccine *
Select Vaccine

Manufacturer *
Manufacturer

MXV Code *
MXV Code

NDC Code
NDC Code

CVX Code *
CVX Code

CPT Code
CPT Code

Funding Source *
Funding Source

Presentation Type *
Presentation Type

Expiration Date *
MM/DD/YYYY

Lot Number *
Lot Number

Available (Doses) *
Available

Administered (Doses) *
0

Wastage (Doses) *
Wastage

Total Received (Doses) *
Total Received

Status *
Active

Submit



6. Once saved, the newly added inventory will display on the Stock Details table. You can see which lots are active and inactive in the 'Lot Status' column. To update inventory details, click on **Edit**.

Clinic Info	Inventory	Site Admin
-------------	-----------	------------

Stock Details

Search

Export Data ↕

Add New +

NAME	LOT NUMBER	LOT STATUS	EXPIRATION DATE	ACTION
Pfizer-BioNTech COVID-19	EW0170	Active	08-31-2021	Edit
Pfizer-BioNTech COVID-19	EW0162	Inactive	07-31-2021	Edit

1 - 2 of 2

|< < > >|

7. A Vaccine Details pop-up will display. Edit the inventory detail fields as appropriate. Scroll down and click **Submit** to save changes.

Vaccine Details

Vaccine *
Moderna COVID-19

Manufacturer *
Moderna US, Inc.

MXV Code *
MOD

NDC Code
80777-0273-99

CVX Code *
207

CPT Code
91301

Funding Source *
Pandemic

Presentation Type *
Multi-dose vial

Expiration Date *
01/31/2021

Lot Number *
321

Available (Doses) *
1499

Administered (Doses) *
1

Wastage (Doses) *
0

Total Received (Doses) *
1500

Status *
Active

Submit

Exporting Site Inventory

1. Click on the **Inventory** tab.

Clinic Info	Inventory	Site Admin		
Stock Details		Search	Export Data	Add New +
NAME	LOT NUMBER	LOT STATUS	EXPIRATION DATE	ACTION
Moderna COVID-19	321	Active	01-31-2021	Edit
Pfizer-BioNTech COVID-19	123	Active	01-31-2021	Edit

2. Click **Export Data**.

Clinic Info	Inventory	Site Admin		
Stock Details		Search	Export Data	Add New +
NAME	LOT NUMBER	LOT STATUS	EXPIRATION DATE	ACTION
Moderna COVID-19	321	Active	01-31-2021	Edit
Pfizer-BioNTech COVID-19	123	Active	01-31-2021	Edit

3. Click **Show All Exports**.




4. The following screen will display. Click **Download** to download the CSV file that has been created of the exported inventory document.

Patients Invite

Staff Upload

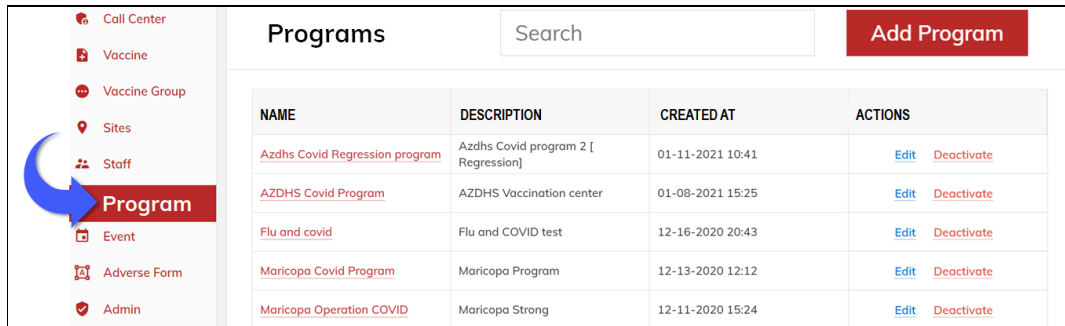
Admin Exports

Export Requests

EXPORT ID	REQUEST TYPE	EVENT ID/SITE NAME	DATE REQUESTED ON	REQUEST STATUS	ACTIONS
622	Inventory	Test Site	06-04-2021, 15:33	COMPLETED	 Download

Adding and Maintaining Vaccine Programs

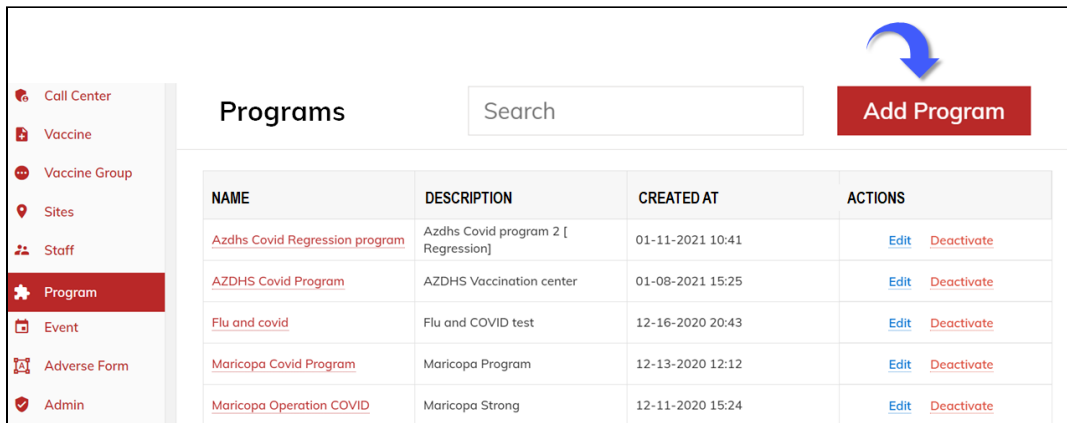
1. Click the **Program** tab from the left menu bar. The page below will display.



The screenshot shows the 'Programs' page. The left sidebar has a menu with items: Call Center, Vaccine, Vaccine Group, Sites, Staff, **Program** (highlighted with a blue arrow), Event, Adverse Form, and Admin. The main content area has a 'Programs' header, a search bar, and an 'Add Program' button. Below is a table with columns: NAME, DESCRIPTION, CREATED AT, and ACTIONS.

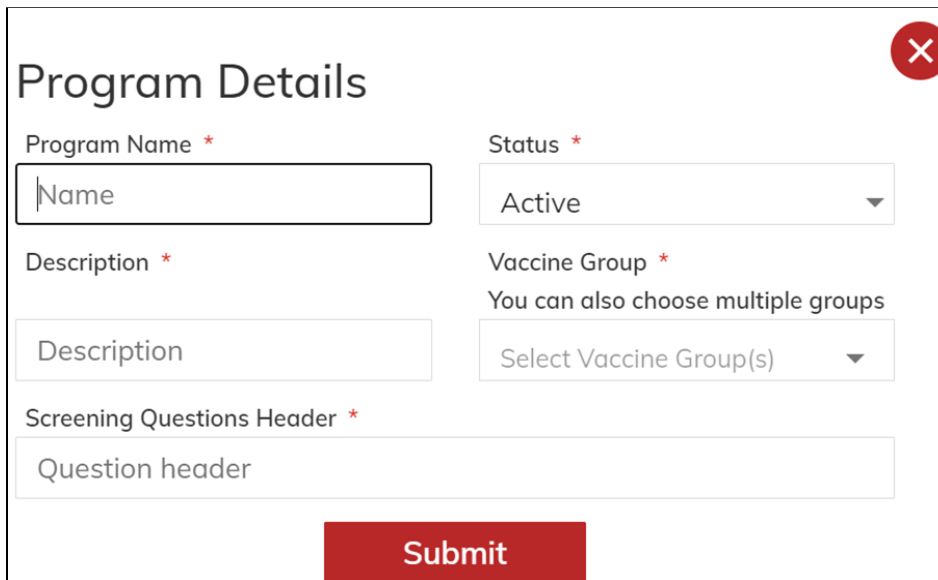
NAME	DESCRIPTION	CREATED AT	ACTIONS
Azdhs Covid Regression program	Azdhs Covid program 2 [Regression]	01-11-2021 10:41	Edit Deactivate
AZDHS Covid Program	AZDHS Vaccination center	01-08-2021 15:25	Edit Deactivate
Flu and covid	Flu and COVID test	12-16-2020 20:43	Edit Deactivate
Maricopa Covid Program	Maricopa Program	12-13-2020 12:12	Edit Deactivate
Maricopa Operation COVID	Maricopa Strong	12-11-2020 15:24	Edit Deactivate

2. Click on **Add Program** to create a new program.



This screenshot is identical to the previous one, but with a blue arrow pointing to the 'Add Program' button in the top right corner of the main content area.

3. Complete all fields of the Program Details screen. Click **Submit** and a new Program has been created.



The 'Program Details' form contains the following fields and controls:

- Program Name ***: Text input field with placeholder 'Name'.
- Status ***: Dropdown menu with 'Active' selected.
- Description ***: Text input field with placeholder 'Description'.
- Vaccine Group ***: Text label above a dropdown menu with placeholder 'Select Vaccine Group(s)'. Below the label is the text 'You can also choose multiple groups'.
- Screening Questions Header ***: Text input field with placeholder 'Question header'.
- Submit**: A large red button at the bottom center.
- A red circular close button with a white 'X' is in the top right corner.

You have the option to edit the existing details for the program or deactivate the program by clicking the **Edit** or **Deactivate** button.

<ul style="list-style-type: none"> Call Center Vaccine Vaccine Group Sites Staff Program Event Adverse Form Admin 	Programs		Search	Add Program	
	NAME	DESCRIPTION	CREATED AT	ACTIONS	
	Azdhs Covid Regression program	Azdhs Covid program 2 [Regression]	01-11-2021 10:41	Edit Deactivate	
	AZDHS Covid Program	AZDHS Vaccination center	01-08-2021 15:25	Edit Deactivate	
	Flu and covid	Flu and COVID test	12-16-2020 20:43	Edit Deactivate	
	Maricopa Covid Program	Maricopa Program	12-13-2020 12:12	Edit Deactivate	
	Maricopa Operation COVID	Maricopa Strong	12-11-2020 15:24	Edit Deactivate	

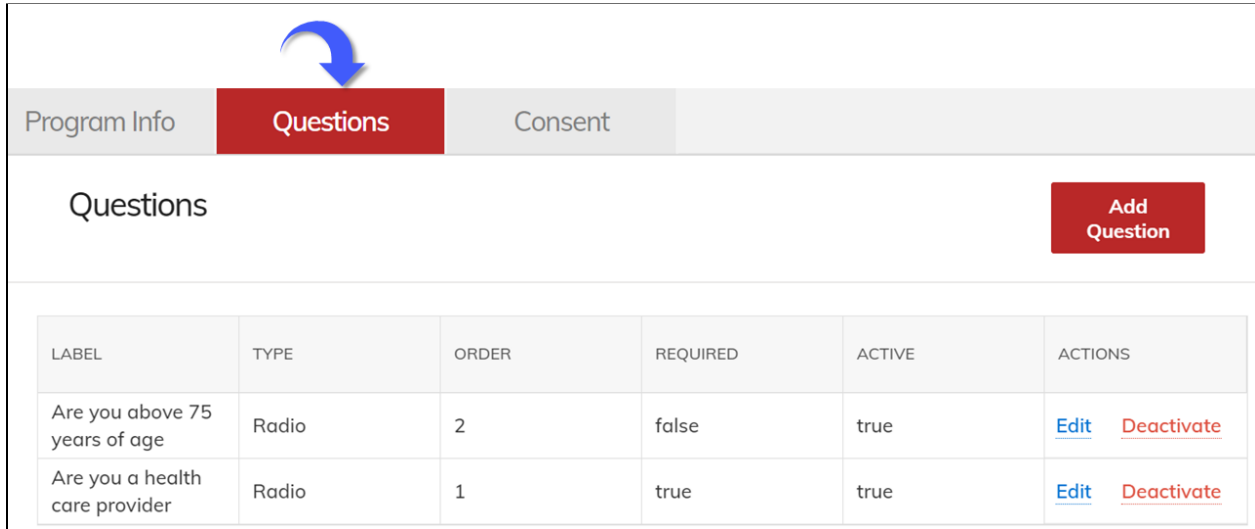
4. To add screening questions or configure consent, click on the program name from the Name column.

<ul style="list-style-type: none"> Call Center Vaccine Vaccine Group Sites Staff Program Event Adverse Form Admin 	Programs		Search	Add Program	
	NAME	DESCRIPTION	CREATED AT	ACTIONS	
	Test Program	Azdhs Covid program 2 [Regression]	01-11-2021 10:41	Edit Deactivate	
	AZDHS Covid Program	AZDHS Vaccination center	01-08-2021 15:25	Edit Deactivate	
	Flu and covid	Flu and COVID test	12-16-2020 20:43	Edit Deactivate	
	Maricopa Covid Program	Maricopa Program	12-13-2020 12:12	Edit Deactivate	
	Maricopa Operation COVID	Maricopa Strong	12-11-2020 15:24	Edit Deactivate	

The screen below will display.

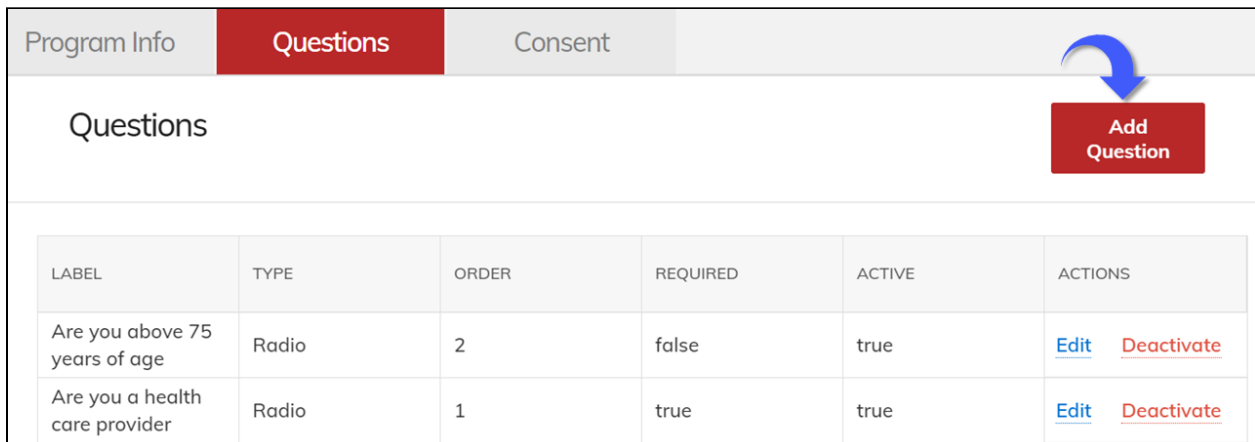
Program Info	Questions	Consent
<p>Name: Azdhs Covid Regression program</p> <p>Description: Azdhs Covid program 2 [Regression]</p> <p>Screen Header: Are You A Health Care Provider</p> <p>Status: Active</p> <div> <p>Vaccine Groups</p> <ul style="list-style-type: none"> Flu COVID 19 </div>		

5. To manage screening questions, click the **Questions** tab.



LABEL	TYPE	ORDER	REQUIRED	ACTIVE	ACTIONS
Are you above 75 years of age	Radio	2	false	true	Edit Deactivate
Are you a health care provider	Radio	1	true	true	Edit Deactivate

6. Click **Add Question** to add screening questions. The screening questions will display on the patient portal after the patient selects the program when scheduling an appointment.



LABEL	TYPE	ORDER	REQUIRED	ACTIVE	ACTIONS
Are you above 75 years of age	Radio	2	false	true	Edit Deactivate
Are you a health care provider	Radio	1	true	true	Edit Deactivate

- Enter the screening question you would like to add and complete all of the fields. You can use the **Auto Translate to Spanish** or type in the Spanish version in the Spanish box. When done, click **Submit**.

Note: if the Spanish box is not populated, the question will default to the English version.

Note: Check the “Is it required?” checkbox if the respondent will be required to answer this question.

Click the “Is it active?” checkbox to activate the question so that it is included with the screening questions shown to patients. If the “Is it Active?” checkbox is unchecked, that question will not be included with the list of screening questions shown to patients.

Add Question ✕

1. Question *

English

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x²

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☷

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☷

default

Times New Rom

3

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✕

</>

Are you feeling sick today?

🔗

Auto Translate for Spanish

Spanish

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B

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x₂

x²

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☷

☰

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default

Times New Rom

3

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🖼️

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✕

</>

¿Se ha sentido enfermo hoy?

2. Question Type *

☐ Text
 ☒ Yes/No
 ☐ Mutiple Choice
 ☐ Choice

3. Order *

1

Is it required? ☒

Is it active? ☒

Submit

22

8. You can edit questions as needed by clicking the **Edit** button and updating the information within the Question screen. Remove questions by clicking Deactivate.

Program Info	Questions	Consent			
Questions			Add Question		
LABEL	TYPE	ORDER	REQUIRED	ACTIVE	ACTIONS
Are you above 75 years of age	Radio	2	false	true	Edit Deactivate
Are you a health care provider	Radio	1	true	true	Edit Deactivate

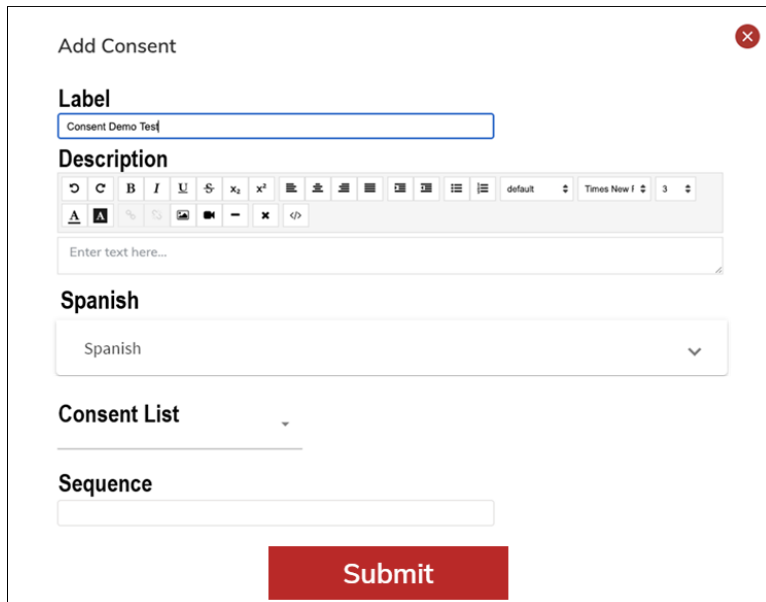
9. Click the **Consent** tab to configure the Patient Consent details required for this particular program. The consent will display on the Patient Consent screen while scheduling an appointment.

Program Info	Questions	Consent	
Consents			Add Consent
LABEL	DESCRIPTION	CONSENTS	ACTIONS
New program consent	I CONSENT TO VACCINATION	name,date	Edit Delete
I agree to the Terms and Conditions		name,date	Edit Delete

10. To begin, click **Add Consent**.


Program Info	Questions	Consent	
Consents			Add Consent
LABEL	DESCRIPTION	CONSENTS	ACTIONS
New program consent	I CONSENT TO VACCINATION	name,date	Edit Delete
I agree to the Terms and Conditions		name,date	Edit Delete

11. In the **Label** field, enter the title of the consent.



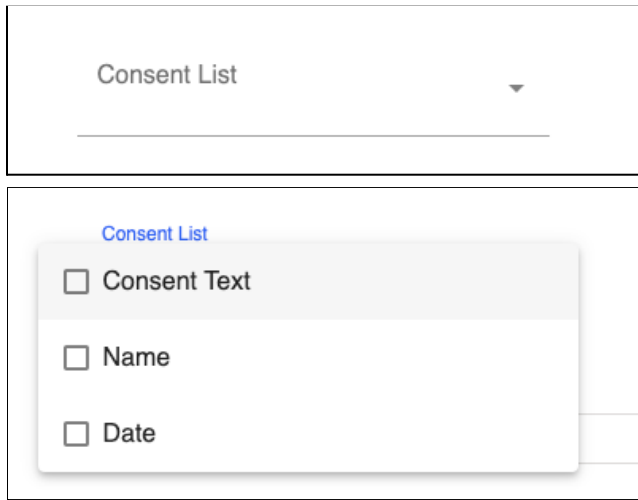
The screenshot shows the 'Add Consent' form. The 'Label' field is filled with 'Consent Demo Test'. The 'Description' field has a rich text editor with a toolbar and a text area containing 'Enter text here...'. The 'Spanish' section has a dropdown menu showing 'Spanish'. The 'Consent List' and 'Sequence' fields are empty. A red 'Submit' button is at the bottom right.

12. In the **Description** field, enter the consent text that the patient will read on the patient portal. You can use the **Auto Translate to Spanish** or type in the Spanish version in the Spanish box.



The screenshot shows the 'Add Consent' form with two sections: 'English' and 'Spanish'. Each section has a 'Label' field and a 'Description' field with a rich text editor. The 'English' section has a button labeled 'Auto Translate for Spanish' below the description field. The 'Spanish' section is identical but lacks the translation button. Both sections have a red close button in the top right corner.

13. The **Consent List** field has a drop down to select the information that should show on the Consent Page. Select the information you want to display (you can click more than one option).



Consent List

Consent List

☐ Consent Text

☐ Name

☐ Date

14. The **Sequence** field will determine the order your consent message(s) will display. Use the up and down arrows to order the consents. If there is only one consent, "1" should display in the **Sequence** field. When done click **Submit**.



Sequence *

1

Submit

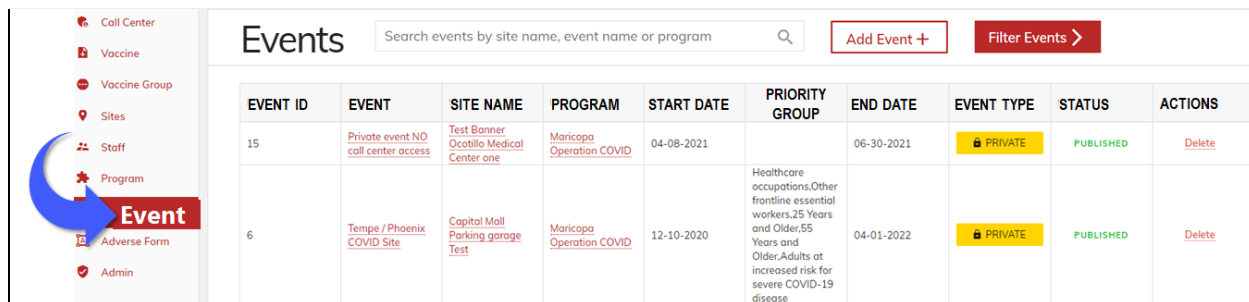
The new Consent(s) will display in the table.

Program Info	Questions	Consent	
Consents			Add Consent
LABEL	DESCRIPTION	CONSENTS	ACTIONS
New program consent	I CONSENT TO VACCINATION	name,date	Edit Delete
I agree to the Terms and Conditions		name,date	Edit Delete



Adding an Event

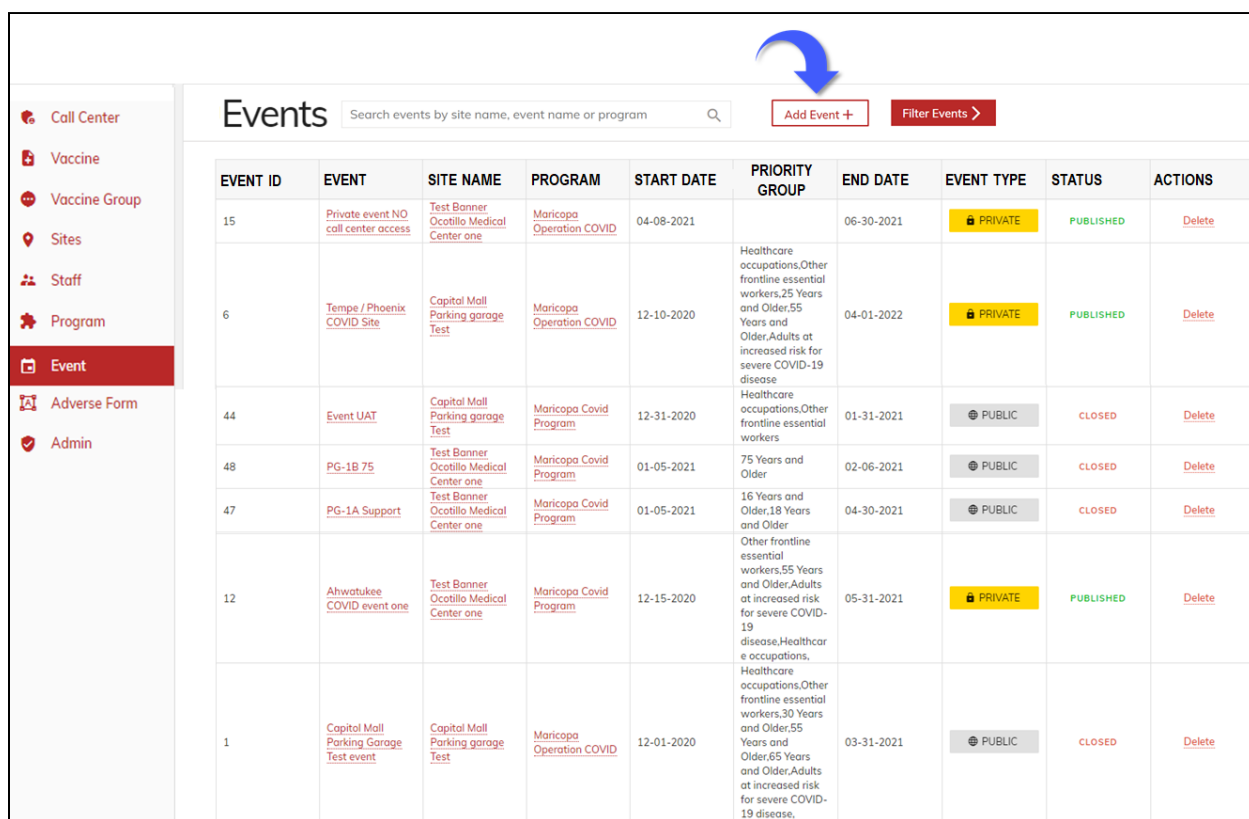
- To manage events, click the **Events** tab on the left menu bar.



The screenshot shows the 'Events' page interface. On the left is a sidebar with navigation tabs: Call Center, Vaccine, Vaccine Group, Sites, Staff, Program, **Event** (highlighted with a blue arrow), Adverse Form, and Admin. The main content area is titled 'Events' and includes a search bar with the placeholder text 'Search events by site name, event name or program'. To the right of the search bar are two buttons: 'Add Event +' and 'Filter Events >'. Below these is a table with the following columns: EVENT ID, EVENT, SITE NAME, PROGRAM, START DATE, PRIORITY GROUP, END DATE, EVENT TYPE, STATUS, and ACTIONS. The table contains two rows of event data.

EVENT ID	EVENT	SITE NAME	PROGRAM	START DATE	PRIORITY GROUP	END DATE	EVENT TYPE	STATUS	ACTIONS
15	Private event NO call center access	Test Banner Ocotillo Medical Center one	Maricopa Operation COVID	04-08-2021		06-30-2021	PRIVATE	PUBLISHED	Delete
6	Tempe / Phoenix COVID Site	Capital Mall Parking garage Test	Maricopa Operation COVID	12-10-2020	Healthcare occupations, Other frontline essential workers, 25 Years and Older, Adults at increased risk for severe COVID-19 disease	04-01-2022	PRIVATE	PUBLISHED	Delete

- To add an event, click **Add Event**.



This screenshot shows the 'Events' page with a blue arrow pointing to the 'Add Event +' button. The sidebar on the left is the same as in the previous screenshot. The main content area shows the 'Events' table with 10 columns. This view displays a larger set of events, including some with 'CLOSED' status and 'PUBLIC' event types.

EVENT ID	EVENT	SITE NAME	PROGRAM	START DATE	PRIORITY GROUP	END DATE	EVENT TYPE	STATUS	ACTIONS
15	Private event NO call center access	Test Banner Ocotillo Medical Center one	Maricopa Operation COVID	04-08-2021		06-30-2021	PRIVATE	PUBLISHED	Delete
6	Tempe / Phoenix COVID Site	Capital Mall Parking garage Test	Maricopa Operation COVID	12-10-2020	Healthcare occupations, Other frontline essential workers, 25 Years and Older, 55 Years and Older, Adults at increased risk for severe COVID-19 disease	04-01-2022	PRIVATE	PUBLISHED	Delete
44	Event UAT	Capital Mall Parking garage Test	Maricopa Covid Program	12-31-2020	Healthcare occupations, Other frontline essential workers	01-31-2021	PUBLIC	CLOSED	Delete
48	PG-1B 75	Test Banner Ocotillo Medical Center one	Maricopa Covid Program	01-05-2021	75 Years and Older	02-06-2021	PUBLIC	CLOSED	Delete
47	PG-1A Support	Test Banner Ocotillo Medical Center one	Maricopa Covid Program	01-05-2021	16 Years and Older, 18 Years and Older	04-30-2021	PUBLIC	CLOSED	Delete
12	Ahwatukee COVID event one	Test Banner Ocotillo Medical Center one	Maricopa Covid Program	12-15-2020	Other frontline essential workers, 55 Years and Older, Adults at increased risk for severe COVID-19 disease, Healthcare occupations,	05-31-2021	PRIVATE	PUBLISHED	Delete
1	Capital Mall Parking Garage Test event	Capital Mall Parking garage Test	Maricopa Operation COVID	12-01-2020	Healthcare occupations, Other frontline essential workers, 30 Years and Older, 55 Years and Older, 65 Years and Older, Adults at increased risk for severe COVID-19 disease,	03-31-2021	PUBLIC	CLOSED	Delete



3. The Event Details screen will display. **Complete the required fields** (marked with a red asterisk). Select a Program to associate with this event from the Program dropdown list containing the previously entered Programs. Scroll down and click **Submit**.

Event Details

Event Name *

Event name

Program *

Select Program

Site *

Select Site

Priority Group

Select Priority Group(s)

Email *

Email

Phone number *

Phone number

Start date *

MM/DD/YYYY

End date *

MM/DD/YYYY

Start time *

--:--

End time *

--:--

Slot Duration *

Slot frequency in mins

Address

Search address

☐ Enter address manually

Street *

Street

City *

City

Suite/Apt

Suite/Apt

County *

Select County

State *

State

Zip code *

Zip code

POC Contact Name

Contact Name

POC Contact Number

POC Contact Number

Type *

Public

☐ Limit event to county residents only

Description

English

Description

Auto Translate for Spanish

Spanish

Submit



Note: There is a call center box to add event instructions specific to the call center. For example, if the event has specific requirements, add them here for the call center to see (The public will not see these notes).

The screenshot shows the 'Event Details' form. At the top, there is a 'Public' dropdown menu and a checkbox labeled 'Limit event to county residents only'. Below this is the 'Call Center Instructions' section, which contains a text area for 'Call Center Instructions'. Underneath is the 'Description' section, which includes a language dropdown set to 'English' and a text area for the event description.

If you don't see a Program listed, it needs to be created by going back to the **Program** tab and clicking **Add Program**. Click for instructions for [Adding and Maintaining a Vaccine Program](#).

Note: The start date, start time, end date, and end time apply to the dates and business hours during which the event will be operational.

The slot frequency will determine the amount of time each appointment will run. For example, if you want to add slot frequency as 60 minutes (you will just need to type the number "60" in the **Slot Duration** field) and start time is 9 AM, while end time is 5 PM, the appointments will be booked for one hour each as - 9 AM - 10 AM, 10 AM -11 AM, and so on, till 4 PM - 5 PM.

The screenshot shows the 'Event Details' form with the following fields: 'Event Name*' (text input), 'Program*' (dropdown menu), 'Site*' (dropdown menu), 'Priority Group' (dropdown menu), 'Email*' (text input), 'Phone number*' (text input), 'Start date*' (calendar icon), 'End date*' (calendar icon), 'Start time*' (time selector showing 09:00 AM), 'End time*' (time selector showing 05:00 PM), and 'Slot Duration*' (text input showing 60).



Note: If an event is public, State Level Call Center Agents will be able to book into the event. If the event is marked as private, you will have the option to either allow State Level Call Center Agents to book into it or not. If you want to allow, check the box that reads: **Allow access for State Level Call Center Agents**.

The screenshot shows the 'Event Details' form. The 'Type' dropdown is set to 'Private'. The checkbox 'Allow access for State Level Call Center Agents' is unchecked. A blue arrow points to this checkbox.

If an event is public, you will have the option to restrict the event to county residents by checking the box.

The screenshot shows the 'Event Details' form. The 'Type' dropdown is set to 'Public'. The checkbox 'Limit event to county residents only' is unchecked. A blue arrow points to this checkbox.

4. Choose the type of event by selecting either Public or **Private** in the **Type** field.

Note: A public event can be seen by anyone who qualifies for the event, whereas a private event is invite only or used for onsite registration.

The screenshot shows a close-up of the 'Type' dropdown menu. The options 'Public' and 'Private' are visible.

An event will be created and displayed on the Event list view, as shown in the screenshot below.



Call Center

Vaccine

Vaccine Group

Sites

Staff

Program

Event

Adverse Form

Admin

Events

Search events by site name, event name or program

Add Event +

Filter Events >

EVENT ID	EVENT	SITE NAME	PROGRAM	START DATE	PRIORITY GROUP	END DATE	EVENT TYPE	STATUS	ACTIONS
15	Private event NO call center access	Test Banner Ocotillo Medical Center one	Maricopa Operation COVID	04-08-2021	Healthcare occupations,Other frontline essential workers,25 Years and Older,55 Years and Older,Adults at increased risk for severe COVID-19 disease	06-30-2021	<div>PRIVATE</div>	<div>PUBLISHED</div>	Delete
6	Tempe / Phoenix COVID Site	Capital Mall Parking garage Test	Maricopa Operation COVID	12-10-2020		04-01-2022	<div>PRIVATE</div>	<div>PUBLISHED</div>	Delete

Note: Newly created Events will default to 'UNPUBLISHED'. When you're ready for the event to be available for patients to book, you will need to manually update the status to 'PUBLISHED'.

Note: Ensure the details of an event have been finalized before publishing. You can use the auto translate feature to translate the description from English to Spanish or type directly into the box.

Note: Any time you unpublish an event (even if it is temporary to edit an event), it will be unavailable for the public to book until the status is updated to PUBLISHED again.

- To set the number of appointments that will be available for patients to book for each time slot or to assign staff, click on the name of the event in the Event column.

Call Center

Vaccine

Vaccine Group

Sites

Staff

Program

Event

Adverse Form

Admin

Events

Search events by site name, event name or program

Add Event +

Filter Events >

EVENT ID	EVENT	SITE NAME	PROGRAM	START DATE	PRIORITY GROUP	END DATE	EVENT TYPE	STATUS	ACTIONS
15	Private event NO call center access	Test Banner Ocotillo Medical Center one	Maricopa Operation COVID	04-08-2021	Healthcare occupations, Other frontline essential workers, 25 Years and Older, 55 Years and Older, Adults at increased risk for severe COVID-19 disease	06-30-2021	PRIVATE	PUBLISHED	Delete
6	Tempe / Phoenix COVID Site	Capital Mall Parking garage Test	Maricopa Operation COVID	12-10-2020		04-01-2022	PRIVATE	PUBLISHED	Delete

- This screen will display. Click the **Scheduler** Tab.

Event Info

Scheduler

Staff

Invitee

Followup Event

Export

Test Event

Program: [Maricopa Operation COVID](#)

Site: [Test Banner Ocotillo Medical Center one](#)

Date: 04-08-2021 - 06-30-2021

Timing: 8:00 AM - 8:00 PM

Contact: (111) 111-1111

Email: emily.labattaglia+testevent@mtxb2b.com

Status: Approved

2550 N Nevada St
Chandler, Arizona 85225



- The following screen will display. Click the calendar icon on the right side of the screen and select the date you want to set availability for.

- The screen will update to display the current schedule for that date. The appointment reflects the slot duration configured in the Event configuration. We will now review the steps for allocating the number of appointments for the time slots.

There are three methods you can use to select the number of time slots to add availability to. For each of the methods, when you select a time slot to edit, it will display in yellow. Once you select the slots you want to add availability for, you will type in the number of appointments you want to be available for that selection into the “Slot count” field and finally, you will click **Update Available Slots**.

You will choose the method that best meets your needs and saves you the most time! Next, we'll detail each method.

Note: To cancel appointments, select either the column, row, or blocks and click ‘Cancel Selected Appointments’. If patients are scheduled during that time, it will send them an email letting them know that their appointment has been cancelled for administrative reasons.

Method 1: Allocating for One Date and Time

- Click the box for the date and time you wish to add availability to. In the example below, 03/29/21 at 10:00am has been chosen.

You will see the highlighted box is yellow, letting you know that you’ve only selected this date and time.



Event Info	Scheduler	Staff	Invitee	Followup Event	Export		
Slot count		UPDATE AVAILABLE SLOTS		CANCEL SELECTED APPOINTMENTS			
<input type="text" value="03/29/2021"/>							
DATE :	03-29-2021	03-30-2021	03-31-2021	04-01-2021	04-02-2021	04-03-2021	04-04-2021
AVAILABLE :	0	0	0	0	0	0	0
BOOKED :	0	0	0	0	0	0	0
TOTAL :	0	0	0	0	0	0	0
10:00 AM	AVAILABLE 0 BOOKED 0	AVAILABLE 0 BOOKED 0	AVAILABLE 0 BOOKED 0	AVAILABLE 0 BOOKED 0	AVAILABLE 0 BOOKED 0	AVAILABLE 0 BOOKED 0	AVAILABLE 0 BOOKED 0
10:05 AM	AVAILABLE 0 BOOKED 0	AVAILABLE 0 BOOKED 0	AVAILABLE 0 BOOKED 0	AVAILABLE 0 BOOKED 0	AVAILABLE 0 BOOKED 0	AVAILABLE 0 BOOKED 0	AVAILABLE 0 BOOKED 0
10:10 AM	AVAILABLE 0 BOOKED 0	AVAILABLE 0 BOOKED 0	AVAILABLE 0 BOOKED 0	AVAILABLE 0 BOOKED 0	AVAILABLE 0 BOOKED 0	AVAILABLE 0 BOOKED 0	AVAILABLE 0 BOOKED 0

- Next you will enter the number of available time slots for that date and time into the “Slot count” field and click **Update Available Slots**.

In the example below, the number of available appointments is currently set to “0” for 03/29/21, but for this example we will change it to “10” by entering into the “Slot count” box and clicking Update Available Slots.

Event Info	Scheduler	Staff	Invitee	Followup Event	Export		
10		UPDATE AVAILABLE SLOTS		CANCEL SELECTED APPOINTMENTS			
<input type="text" value="03/29/2021"/>							
DATE :	03-29-2021	03-30-2021	03-31-2021	04-01-2021	04-02-2021	04-03-2021	04-04-2021
AVAILABLE :	0	0	0	0	0	0	0
BOOKED :	0	0	0	0	0	0	0
TOTAL :	0	0	0	0	0	0	0
10:00 AM	AVAILABLE 0 BOOKED 0	AVAILABLE 0 BOOKED 0	AVAILABLE 0 BOOKED 0	AVAILABLE 0 BOOKED 0	AVAILABLE 0 BOOKED 0	AVAILABLE 0 BOOKED 0	AVAILABLE 0 BOOKED 0
10:05 AM	AVAILABLE 0 BOOKED 0	AVAILABLE 0 BOOKED 0	AVAILABLE 0 BOOKED 0	AVAILABLE 0 BOOKED 0	AVAILABLE 0 BOOKED 0	AVAILABLE 0 BOOKED 0	AVAILABLE 0 BOOKED 0
10:10 AM	AVAILABLE 0 BOOKED 0	AVAILABLE 0 BOOKED 0	AVAILABLE 0 BOOKED 0	AVAILABLE 0 BOOKED 0	AVAILABLE 0 BOOKED 0	AVAILABLE 0 BOOKED 0	AVAILABLE 0 BOOKED 0



Notice that the number of appointments updated for just the 03/29/21 at the 10:00am time slot.

Event Info	Scheduler	Staff	Invitee	Followup Event	Export		
10		UPDATE AVAILABLE SLOTS		CANCEL SELECTED APPOINTMENTS		03/29/2021	
DATE :		03-29-2021	03-30-2021	03-31-2021	04-01-2021	04-02-2021	04-03-2021
AVAILABLE :		10	0	0	0	0	0
BOOKED :		0	0	0	0	0	0
TOTAL :		10	0	0	0	0	0
10:00 AM	AVAILABLE	10	AVAILABLE	0	AVAILABLE	0	AVAILABLE
	BOOKED	0	BOOKED	0	BOOKED	0	BOOKED
10:05 AM	AVAILABLE	0	AVAILABLE	0	AVAILABLE	0	AVAILABLE
	BOOKED	0	BOOKED	0	BOOKED	0	BOOKED
10:10 AM	AVAILABLE	0	AVAILABLE	0	AVAILABLE	0	AVAILABLE
	BOOKED	0	BOOKED	0	BOOKED	0	BOOKED

Method 2: Allocate for an Appointment Time Over Multiple Days

- To save time, you can change the number of available appointments for an entire row of time slots for multiple dates. Click on one of the time slots in the left column with times listed. In the example below, the 10:05 time row was selected.

You can also click on multiple slots to update them at the same time.

In the example below, the entire 10:05 row was selected, as well as multiple individually selected time slots. You will know a time slot(s) has been selected when they are highlighted in yellow.

Every time slot highlighted in yellow will be updated when availability is updated. Appointments highlighted in green (or not highlighted) will not be affected by the update.

Event Info	Scheduler	Staff	Invitee	Followup Event	Export		
Slot count		UPDATE AVAILABLE SLOTS		CANCEL SELECTED APPOINTMENTS		03/29/2021	
DATE :		03-29-2021	03-30-2021	03-31-2021	04-01-2021	04-02-2021	04-03-2021
AVAILABLE :		10	0	0	0	0	0
BOOKED :		0	0	0	0	0	0
TOTAL :		10	0	0	0	0	0
10:00 AM	AVAILABLE	10	AVAILABLE	0	AVAILABLE	0	AVAILABLE
	BOOKED	0	BOOKED	0	BOOKED	0	BOOKED
10:05 AM	AVAILABLE	0	AVAILABLE	0	AVAILABLE	0	AVAILABLE
	BOOKED	0	BOOKED	0	BOOKED	0	BOOKED
10:10 AM	AVAILABLE	0	AVAILABLE	0	AVAILABLE	0	AVAILABLE
	BOOKED	0	BOOKED	0	BOOKED	0	BOOKED



To update availability, enter the number of appointments you want to make available for those dates & times into the **Slot count** field.

In the example below, the number of available appointments was changed from 0 to 5.

Event Info

Scheduler

Staff

Invitee

Followup Event

Export

5

UPDATE AVAILABLE SLOTS

CANCEL SELECTED APPOINTMENTS

03/29/2021

DATE:	03-29-2021	03-30-2021	03-31-2021	04-01-2021	04-02-2021	04-03-2021	04-04-2021
AVAILABLE:	15	5	5	5	10	10	5
BOOKED:	0	0	0	0	0	0	0
TOTAL:	15	5	5	5	10	10	5

10:00 AM	AVAILABLE 10	AVAILABLE 0	AVAILABLE 0	AVAILABLE 0	AVAILABLE 0	AVAILABLE 0	AVAILABLE 0
	BOOKED 0	BOOKED 0	BOOKED 0	BOOKED 0	BOOKED 0	BOOKED 0	BOOKED 0
10:05 AM	AVAILABLE 5	AVAILABLE 5	AVAILABLE 5	AVAILABLE 5	AVAILABLE 5	AVAILABLE 5	AVAILABLE 5
	BOOKED 0	BOOKED 0	BOOKED 0	BOOKED 0	BOOKED 0	BOOKED 0	BOOKED 0
10:10 AM	AVAILABLE 0	AVAILABLE 0	AVAILABLE 0	AVAILABLE 0	AVAILABLE 5	AVAILABLE 5	AVAILABLE 0
	BOOKED 0	BOOKED 0	BOOKED 0	BOOKED 0	BOOKED 0	BOOKED 0	BOOKED 0

Method 3: Allocate for an Entire Day (or Multiple Entire Days)

The next example will work in a similar way, you choose an entire date and update the number of available appointment slots.

1. Click on the Date Column(s) to select the date(s) you want to modify. Enter the number of appointments you want to make available for those dates into the “Slot count” field and click **Update Available Slots**.

For this example 4/5/21 and 4/6/21 were selected by clicking on the **Date Column** at the top of the columns for each date (which highlighted those dates). The number of available appointments will be updated from 0 to 33.

Event Info

Scheduler

Staff

Invitee

Followup Event

Export

33

UPDATE AVAILABLE SLOTS

CANCEL SELECTED APPOINTMENTS

DATE	04-05-2021	04-06-2021	04-07-2021	04-08-2021
AVAILABLE :	0	0	0	0
BOOKED :	0	0	0	0
TOTAL :	0	0	0	0
10:00 AM	AVAILABLE 0	AVAILABLE 0	AVAILABLE 0	AVAILABLE 0
	BOOKED 0	BOOKED 0	BOOKED 0	BOOKED 0
10:05 AM	AVAILABLE 0	AVAILABLE 0	AVAILABLE 0	AVAILABLE 0
	BOOKED 0	BOOKED 0	BOOKED 0	BOOKED 0
10:10 AM	AVAILABLE 0	AVAILABLE 0	AVAILABLE 0	AVAILABLE 0
	BOOKED 0	BOOKED 0	BOOKED 0	BOOKED 0
10:15 AM	AVAILABLE 0	AVAILABLE 0	AVAILABLE 0	AVAILABLE 0
	BOOKED 0	BOOKED 0	BOOKED 0	BOOKED 0

Event Info	Scheduler	Staff	Invitee	Followup Event	Export
<div><div>Slot count</div><div>UPDATE AVAILABLE SLOTS</div><div>CANCEL SELECTED APPOINTMENTS</div></div>					
DATE:	04-05-2021	04-06-2021	04-07-2021	04-08-2021	
AVAILABLE:	4785	4785	0	0	
BOOKED:	0	0	0	0	
TOTAL:	4785	4785	0	0	
10:00 AM	AVAILABLE 33	AVAILABLE 33	AVAILABLE 0	AVAILABLE 0	
	BOOKED 0	BOOKED 0	BOOKED 0	BOOKED 0	
10:05 AM	AVAILABLE 33	AVAILABLE 33	AVAILABLE 0	AVAILABLE 0	
	BOOKED 0	BOOKED 0	BOOKED 0	BOOKED 0	
10:10 AM	AVAILABLE 33	AVAILABLE 33	AVAILABLE 0	AVAILABLE 0	
	BOOKED 0	BOOKED 0	BOOKED 0	BOOKED 0	
10:15 AM	AVAILABLE 33	AVAILABLE 33	AVAILABLE 0	AVAILABLE 0	
	BOOKED 0	BOOKED 0	BOOKED 0	BOOKED 0	
	AVAILABLE	AVAILABLE	AVAILABLE	AVAILABLE	

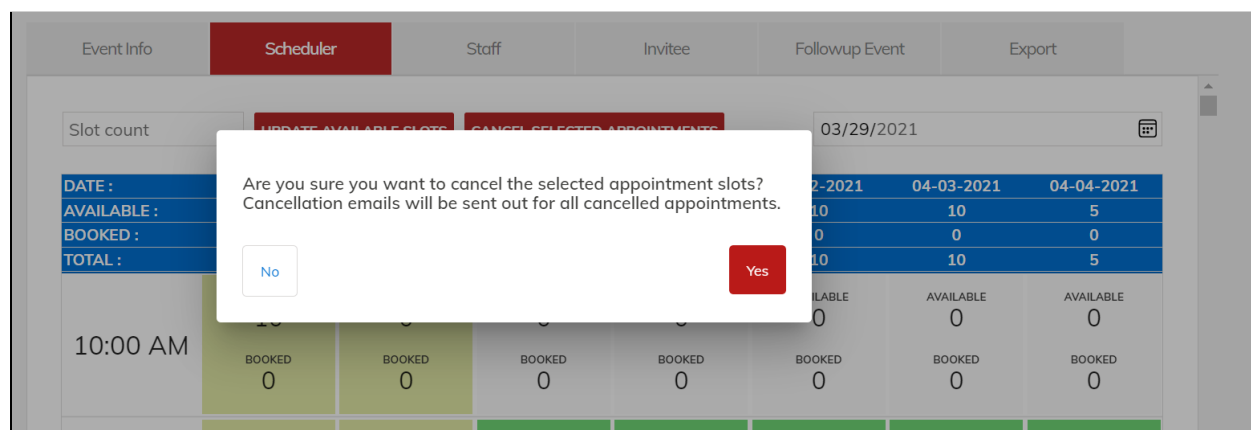


Note: As you get more familiar with the system, you will choose the easiest method for you to update the number of slots in the scheduler. The important thing to remember is you have options for how you choose to modify the number of available appointment slots.

Note: You are able to lower or increase the number of available appointments by selecting a slot and clicking **Update Available Slots** to the number you want. Keep in mind that the changes you make on the scheduler will update the number of available appointments that the patients can book on the Patient Portal.

For instance, if there are 33 available appointments and a patient books 1 appointment, then the display would be: Available(32) Booked(1) Total(33) for that selected slot. If a patient books slots for 4 people together (their family) then the display will be Available(29) Booked(4) Total(33) for that selected slot.

Note: You can cancel appointments by highlighting the row, column, or individual block and clicking on **Cancel Selected Appointments** and a pop-up will display asking if you are sure you want to cancel the appointments. In doing this, it will send a cancellation email to all patients that are registered.



Assigning Staff to an Event

1. To assign staff to an event, begin by clicking on the **Event** tab.





- Click on the event in the Event column.

Call Center

Vaccine

Vaccine Group

Sites

Staff

Program

Event

Adverse Form

Admin

Events

Search events by site name, event name or program

Add Event +

Filter Events >

EVENT ID	EVENT	SITE NAME	PROGRAM	START DATE	PRIORITY GROUP	END DATE	EVENT TYPE	STATUS	ACTIONS
15	Private event NO call center access	Test Banner Ocotillo Medical Center one	Maricopa Operation COVID	04-08-2021		06-30-2021	PRIVATE	PUBLISHED	Delete
6	Tempe / Phoenix COVID Site	Capital Mall Parking garage Test	Maricopa Operation COVID	12-10-2020	Healthcare occupations, Other frontline essential workers, 25 Years and Older, 55 Years and Older, Adults at increased risk for severe COVID-19 disease	04-01-2022	PRIVATE	PUBLISHED	Delete

- The Event Info tab will display. Click on the **Staff** tab.

Event Info | Scheduler | **Staff** | Invitee | Followup Event | Export

Test Event

Program: [Maricopa Operation COVID](#)
Site: [Capital Mall Parking garage Test](#)
Date: 12-10-2020 - 04-01-2022
Timing: 8:00 AM - 8:00 PM
Contact: (123) 455-6898
Email: vaccineportal+tempeevent@gmail.com
Status: Approved

[Unpublish](#)

295 N 56th St
Phoenix, AZ 85034

[Close Event](#)

- Click **Add Staff** to begin assigning staff to this event.

Event Info	Scheduler	Staff	Invitee	Followup Event	Export
Event Staff Details			<input type="text" value="Search"/>		Add Staff
NAME	EMAIL	PHONE	DESIGNATION	EVENT ROLES	ACTIONS
John Smith	vaccineportal+eventaddtest15@gmail.com	(602) 542-1160	Clinician Test	Check-in	Remove
Betty White	vaccineportal+eventaddtest13@gmail.com	(602) 542-1158	Admin Test	Check-in	Remove
Maria Garcia	vaccineportal+eventaddtest16@gmail.com	(602) 542-1161	Staff Test	Check-in	Remove



5. Type in the **Staff Name** and select the appropriate event role or task for this staff member. Click **Save**, to return to the Staff details page.

Assigning Staff To An Event

Event Role *

Select Staff Name *

Select staff

Save

6. The staff member will be added to the event with an Event Role assigned. A staff member can be removed from an event by clicking **Remove** from the **Staff** tab.

Event Info	Scheduler	Staff	Invitee	Followup Event	Export
------------	-----------	-------	---------	----------------	--------

Event Staff Details

Search

Add Staff

NAME	EMAIL	PHONE	DESIGNATION	EVENT ROLES	ACTIONS
New Staff Entry	vaccineportal+eventa ddtest15@gmail.com	(602) 542-1160	Staff Test	Check-in	Remove

Private Event

1. You may need to create a new event as a **Private Event** that will not be available to the public. To make an event private, select Private from the Type field in the Event Details screen.

Note: When creating a private event, you will have the option to allow access to state call center agents. You can either check the box or leave it unchecked.

Event Details

POC Contact Name

Contact Name

POC Contact Number

POC Contact Number

Type *

Public

Private

☐ Limit event to county residents only



People who have been invited to the private event will display under the event Invitee tab as in the following screenshot.

Event Info	Scheduler	Staff	Invitee	Followup Event	Export
Invitees					
Search					
NAME	DATE OF BIRTH	GENDER	EMAIL	INVITED	
Mark Jackson	11-14-1976	Male	emily.labattaglia+0223test3@mtxb2b.com	02-23-2021	
Samantha Jones	11-21-1980	Female	emily.labattaglia+0223test2@mtxb2b.com	02-23-2021	
Jessica William	10-31-1994	Female	emily.labattaglia+0223test1@mtxb2b.com	02-23-2021	
Janet Jackson	06-13-2000	Male	emily.labattaglia+0128private3@mtxb2b.com	01-28-2021	
Samantha Williams	07-10-1990	Female	emily.labattaglia+0128private2@mtxb2b.com	01-28-2021	

- To upload the list of patients to invite to the event, click the **Admin** tab on the left-hand side of the dashboard.

Call Center
Vaccine
Vaccine Group
Sites
Staff
Program
Event
Adverse Form
Admin

Patients Invite | Staff Upload | Admin Exports

Patient list bulk upload [Sample data](#)

Choose File No file chosen Upload

Patients Invites Upload Details

IMPORT ID	FILE NAME	CREATED DATE	STATUS	TOTAL RECORD	SUCCESS	ERROR
0 of 0 < < > >						

- Click Choose File and select the csv file that has been created with the names of the invitees for the private event. Instructions for creating a comma delimited (csv) file to upload are in the [Appendix](#).

Click **Sample data** on the screen to see an example of a file.

Call Center
Vaccine
Vaccine Group
Sites
Staff
Program
Event
Adverse Form
Admin

Patients Invite | Staff Upload | Admin Exports

Patient list bulk upload [Sample data](#)

Choose File No file chosen Upload

Patients Invites Upload Details

IMPORT ID	FILE NAME	CREATED DATE	STATUS	TOTAL RECORD
0 of 0 < < > >				



4. Click **Upload**.

The status of the upload will display under Status as Processing or Completed. Once the upload is Completed, this screen will display the total number of records, the number of successful uploads, and the number of errors.

Patients Invites Upload Details						
IMPORT ID	FILE NAME	CREATED DATE	STATUS	TOTAL RECORD	SUCCESS	ERROR
2054	17.csv	04-30-2021, 17:09	COMPLETED	1	1	0
2053	16.csv	04-30-2021, 15:49	COMPLETED	2	2	0
2049	15.csv	04-30-2021, 08:20	COMPLETED	5	5	0
2047	14.csv	04-29-2021, 16:23	COMPLETED	4	4	0
2044	2021_04_29-Upload 13.csv	04-29-2021, 11:32	COMPLETED	15	15	0
2043	2021_04_28-Upload 12.csv	04-28-2021, 08:37	COMPLETED	9	9	0
2042	2021_04_27-Upload 11.csv	04-27-2021, 16:51	COMPLETED	12	11	1

Follow up Event

Creating a 2nd dose event (a follow up) to a first dose event will let staff use the follow up feature to schedule the appointment. It will also send an email to the patient inviting them to register for an appointment.

To link a 2nd dose follow up event to a 1st dose event, the follow up event must be private and held at the same site.

1. To create the follow up event, follow the instructions for [Adding an Event](#).
2. Once the follow up event has been created, click the **Followup Event** tab from the Event menu.

3. You will now link the follow up event to the 1st dose event. Click **Add Follow up Event** to link a private second dose event.

4. In the dropdown that displays, you will see a list of events under the same site. Click the event you want to link to and click Save.

Reminder: To link an event, it has to be private and the same site.



5. Once the follow up event is linked, you will see it in the follow up details.

Note: By linking a follow up event, after the first dose is given, the patient is automatically invited to the second dose event and staff onsite will be able to use the follow up feature in the clinician portal to book second dose appointments onsite.

Event Info	Scheduler	Staff	Invitee	Followup Event	Export
Follow Up Details					Add Follow up Event
ID	NAME	START DATE	END DATE	PRIORITY GROUP	
12	Test Event Dose 1	2020-12-15	2021-05-31		

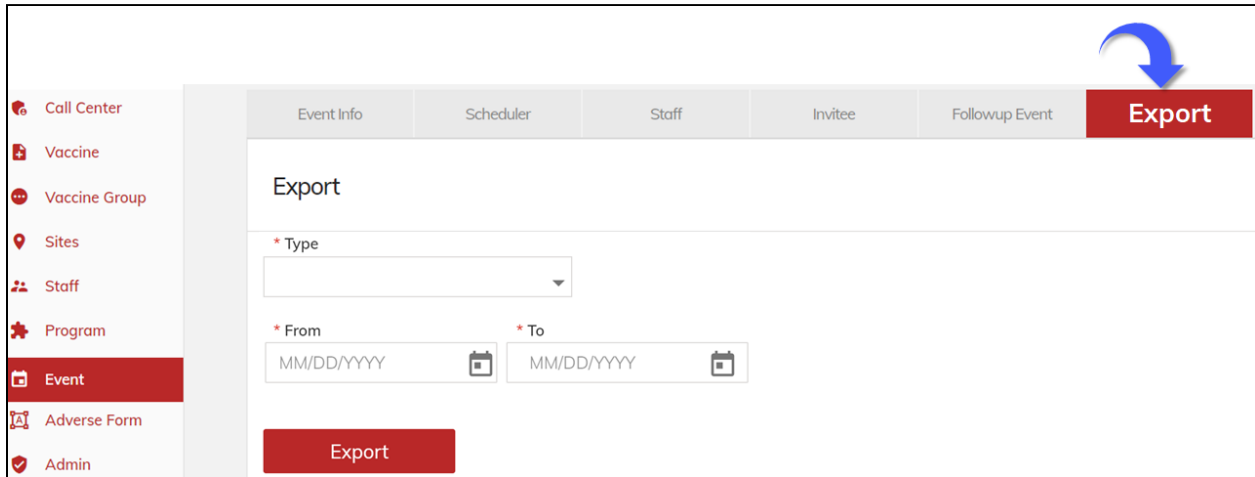
6. Under the second dose event, the Invitee tab will list all of the patients who have been invited. Patients can schedule their follow up onsite or they can schedule (or change) the appointment through the invitation email they will receive.

Call Center Vaccine Vaccine Group Sites Staff Program Event Adverse Form Admin	<	Event Info	Scheduler	Staff	Invitee	Followup Event
	Invitees					Search
	NAME	DATE OF BIRTH	GENDER	EMAIL	INVITED	
	John Doe	11-14-1976	Male	emily.labattaglia+april3@mtxb2b.com	04-01-2021	
	Test Patient	11-14-1976	Male	patient3.bulk8@mailinator.com	04-01-2021	
	Juan Garcia	01-01-1989	Male	vaccineportal+smokeselffn15@gmail.com	03-03-2021	

Export

1. You are able to export a vaccination history report or an appointment history report from within an event. To begin, click the **Export** tab from the top menu.

Note: The vaccination history report shows patients that were vaccinated and done. The appointment history report shows future and previous appointment status.

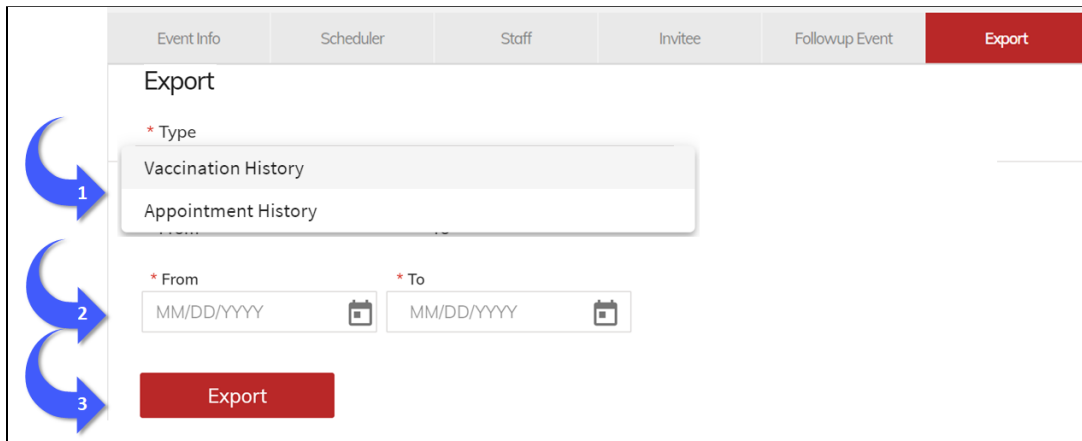


The screenshot shows the 'Export' tab selected in the top navigation bar. The left sidebar has the 'Event' tab selected. The main content area displays the 'Export' form with the following fields:

- * Type: A dropdown menu.
- * From: A date field with a calendar icon, labeled MM/DD/YYYY.
- * To: A date field with a calendar icon, labeled MM/DD/YYYY.
- Export: A red button at the bottom.

2. Click the Type field to select which type of report to run, enter the From and To dates to select the timeframe for the report and click Export.

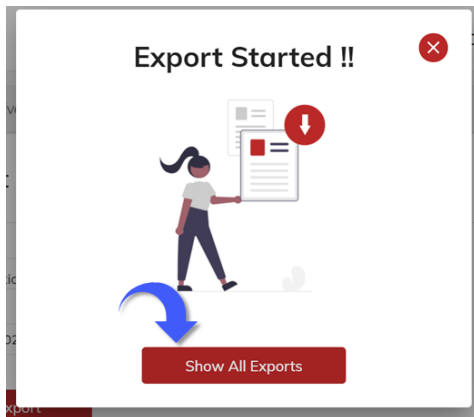
Note: The timeframe cannot exceed 31 days. If an event is longer than 31 days, the report will need to be run in 31 day increments.



The screenshot shows the 'Export' form with annotations indicating the steps to follow:

1. Click the Type field to open the dropdown menu.
2. Select the report type (Vaccination History or Appointment History).
3. Click the Export button.




3. A pop-up will display letting you know that the export has started. Click **Show All Exports** to see the status of the report.



4. While the report is generating, the Request Status will display as processing. Once it completes, the status will change to Completed and you will be able to download the file by clicking **Download**. The request type and event ID will display in the column to differentiate the reports.

Note: A CSV file is generated and will be in your downloads folder.

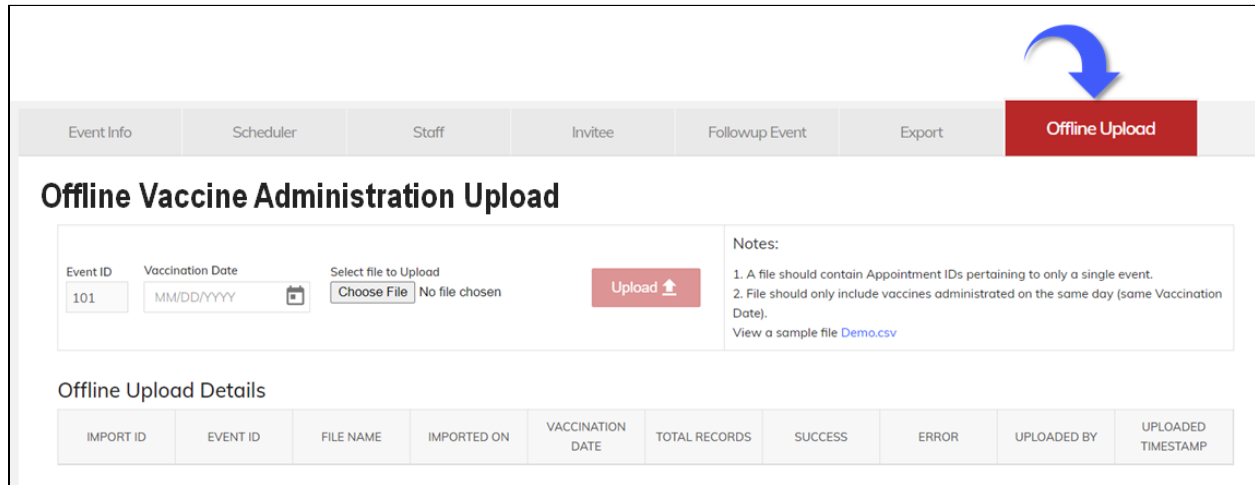
To return to your Exports later, just click the Admin option on the left side.

<ul style="list-style-type: none"> Dashboard Call Center Vaccine Vaccine Group Sites Staff Program Event Adverse Form Admin 	Patients Invite Staff Upload Admin Exports																					
	Export Requests																					
	<table> <tr> <th>EXPORT ID</th><th>REQUEST TYPE</th><th>EVENT ID / SITE NAME</th><th>DATE REQUESTED ON</th><th>REQUEST STATUS</th><th>ACTIONS</th></tr> <tr> <td>623</td><td>Vaccination History</td><td>Event: 15</td><td>06-04-2021, 15:48</td><td>COMPLETED</td><td></td></tr> <tr> <td>622</td><td>Inventory</td><td>Site: AZDHS Vaccination Regression Site</td><td>06-04-2021, 15:33</td><td>COMPLETED</td><td>Download</td></tr> </table>					EXPORT ID	REQUEST TYPE	EVENT ID / SITE NAME	DATE REQUESTED ON	REQUEST STATUS	ACTIONS	623	Vaccination History	Event: 15	06-04-2021, 15:48	COMPLETED		622	Inventory	Site: AZDHS Vaccination Regression Site	06-04-2021, 15:33	COMPLETED
EXPORT ID	REQUEST TYPE	EVENT ID / SITE NAME	DATE REQUESTED ON	REQUEST STATUS	ACTIONS																	
623	Vaccination History	Event: 15	06-04-2021, 15:48	COMPLETED																		
622	Inventory	Site: AZDHS Vaccination Regression Site	06-04-2021, 15:33	COMPLETED	Download																	

Offline Upload

Offline upload can be used to import offline vaccine entries within each event.

1. To begin the offline upload, click Offline Upload.



The screenshot shows the 'Offline Vaccine Administration Upload' interface. At the top, there is a navigation bar with tabs: Event Info, Scheduler, Staff, Invitee, Followup Event, Export, and Offline Upload. The 'Offline Upload' tab is highlighted in red. Below the navigation bar, the main heading is 'Offline Vaccine Administration Upload'. The interface includes a form with the following fields:

- Event ID: 101
- Vaccination Date: MM/DD/YYYY
- Select file to Upload: Choose File (No file chosen)
- Upload button (red)

Notes:

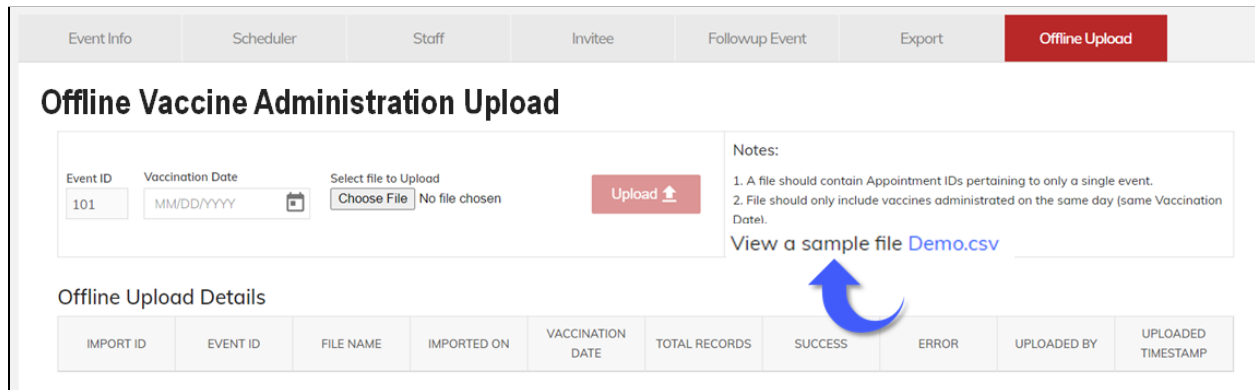
1. A file should contain Appointment IDs pertaining to only a single event.
2. File should only include vaccines administered on the same day (same Vaccination Date).

View a sample file [Demo.csv](#)

Below the form is a table titled 'Offline Upload Details' with the following columns:

IMPORT ID	EVENT ID	FILE NAME	IMPORTED ON	VACCINATION DATE	TOTAL RECORDS	SUCCESS	ERROR	UPLOADED BY	UPLOADED TIMESTAMP
-----------	----------	-----------	-------------	------------------	---------------	---------	-------	-------------	--------------------

To review a sample file that shows all of the required fields that need to be included, click **View a sample file**.



This screenshot is identical to the previous one, but with a blue arrow pointing to the 'View a sample file Demo.csv' link in the Notes section.

Note: The file type must be a .csv and have the following headers: Appointment ID, Event ID, Patient First Name, Patient Last Name, DOB, Vaccinator, Username, Date of Vaccination, Time of Vaccination, Vaccine Name, Vaccine Lot Number, Dose Number, Route of Administration, Body Location, Completion Status, & Notes.

- When the file is ready to be uploaded, ensure the Event ID is correct, enter in the Vaccination Date, and click Choose File.

Event ID
101

Vaccination Date
MM/DD/YYYY

Select file to Upload

Choose File

No file chosen

Note: The Event ID field is read only and pre-populated and the vaccination date is editable.

Note: A file will need to contain appointment IDs that pertain to a single event and the file should include vaccines administered on the same day.

Once the file is uploaded, the progress will show below, under the Offline Upload Details.

Event Info

Scheduler

Staff

Invitee

Followup Event

Export

Offline Upload

Offline Vaccine Administration Upload

Event ID
101

Vaccination Date
MM/DD/YYYY

Select file to Upload

Choose File

No file chosen

Upload

Notes:

1. A file should contain Appointment IDs pertaining to only a single event.
2. File should only include vaccines administered on the same day (same Vaccination Date).

View a sample file [Demo.csv](#)

Offline Upload Details

IMPORT ID	EVENT ID	FILE NAME	IMPORTED ON	VACCINATION DATE	TOTAL RECORDS	SUCCESS	ERROR	UPLOADED BY	UPLOADED TIMESTAMP
-----------	----------	-----------	-------------	------------------	---------------	---------	-------	-------------	--------------------

Note: This process only covers already registered appointments and not onsite walk-ins.

Note: Once the upload is complete, the appointment status will be marked as done and the appointment completed email will be sent. It is important to upload by the next day to prevent No Show emails from being triggered.



Publishing an Event

Ensure the details of an event have been finalized before publishing. At this time, unpublishing an event to edit it may cause the loss of event data.

1. When you're ready to make an event available for patients to book, **click on the name of the event** you would like to publish from the Event column.

Events									
Search									
Add Event									
EVENT ID	EVENT	SITE NAME	PROGRAM	START DATE	PRIORITY GROUP	END DATE	EVENT TYPE	STATUS	ACTIONS
15	Event Name	Test Banner Ocotillo Medical Center one	Maricopa Operation COVID	04-08-2021		06-30-2021	PRIVATE	PUBLISHED	Delete
6	Tempe / Phoenix COVID Site	Capital Mall Parking garage Test	Maricopa Operation COVID	12-10-2020	Healthcare occupations, Other frontline essential workers, 25 Years and Older, 55 Years and Older, Adults at increased risk for severe COVID-19 disease	04-01-2022	PRIVATE	PUBLISHED	Delete

2. Click the **Event Info** tab.

Event Info

Scheduler

Staff

Invitee

Followup Event

Export

Test Event

Program: [Maricopa Operation COVID](#)

Site: [Test Banner Ocotillo Medical Center one](#)

Date: 04-08-2021 - 06-30-2021

Timing: 8:00 AM - 8:00 PM

Contact: (111) 111-1111

Email: emily.labattaglia+testevent@mtxb2b.com

Status: Approved

Publish

Edit

Wickenburg

Tonto Basin

Tonto National Forest

Phoenix

Private event NO call center access

Chandler

Gila Bend

Eloy

2550 N Nevada St

Chandler, Arizona 85225

Close Event

46



- Click **Publish** to make the event live so patients can access and schedule appointments for the event.

Event Info
Scheduler
Staff
Invitee
Followup Event
Export

Test Event

Program: [Maricopa Operation COVID](#)

Site: [Test Banner Ocotillo Medical Center one](#)

Date: 04-08-2021 - 06-30-2021

Timing: 8:00 AM - 8:00 PM

Contact: (111) 111-1111

Email: emily.labattaglia+testevent@mtxb2b.com

Status: Approved

Publish
Edit

2550 N Nevada St
Chandler, Arizona 85225

Close Event

Search for an Event

- To search for an event, click the Events tab on the left menu bar.

Call Center
Vaccine
Vaccine Group
Sites
Staff
Program
Event
Adverse Form
Admin

Events

Search events by site name, event name or program
Add Event +
Filter Events >

EVENT ID	EVENT	SITE NAME	PROGRAM	START DATE	PRIORITY GROUP	END DATE	EVENT TYPE	STATUS	ACTIONS
15	Private event NO call center access	Test Banner Ocotillo Medical Center one	Maricopa Operation COVID	04-08-2021		06-30-2021	PRIVATE	PUBLISHED	Delete
6	Tempe / Phoenix COVID Site	Capital Mall Parking garage Test	Maricopa Operation COVID	12-10-2020	Healthcare occupations, Other frontline essential workers, 25 Years and Older, 55 Years and Older, Adults at increased risk for severe COVID-19 disease	04-01-2022	PRIVATE	PUBLISHED	Delete

Once an event has been added, you can search for events using the search bar or with the filter events option.

Call Center
Vaccine
Vaccine Group
Sites
Staff
Program
Event
Adverse Form
Admin

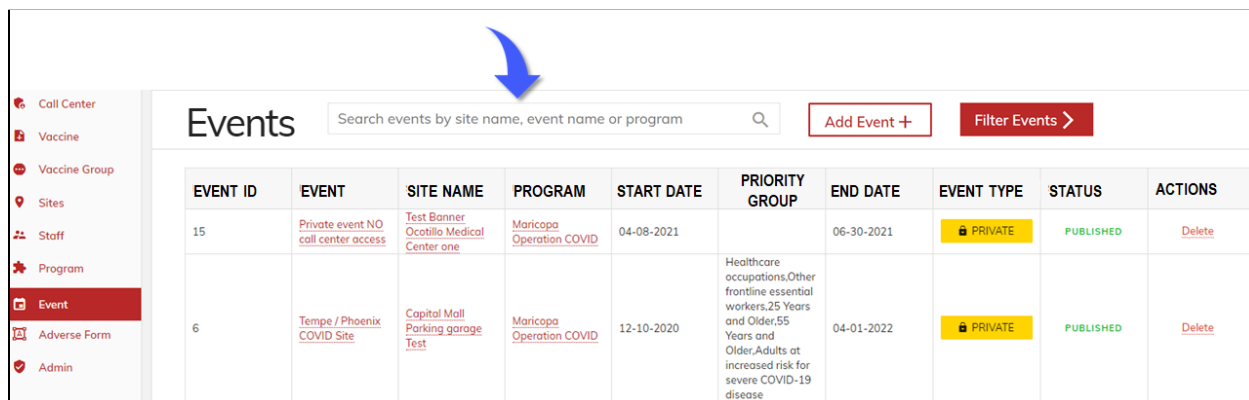
Events

Search events by site name, event name or program
Add Event +
Filter Events >

EVENT ID	EVENT	SITE NAME	PROGRAM	START DATE	PRIORITY GROUP	END DATE	EVENT TYPE	STATUS	ACTIONS
15	Private event NO call center access	Test Banner Ocotillo Medical Center one	Maricopa Operation COVID	04-08-2021		06-30-2021	PRIVATE	PUBLISHED	Delete
6	Tempe / Phoenix COVID Site	Capital Mall Parking garage Test	Maricopa Operation COVID	12-10-2020	Healthcare occupations, Other frontline essential workers, 25 Years and Older, 55 Years and Older, Adults at increased risk for severe COVID-19 disease	04-01-2022	PRIVATE	PUBLISHED	Delete



- You can search for events by entering the event name, site name, or program name into the search bar (partial searches can be done). The search will begin automatically as you enter the information.

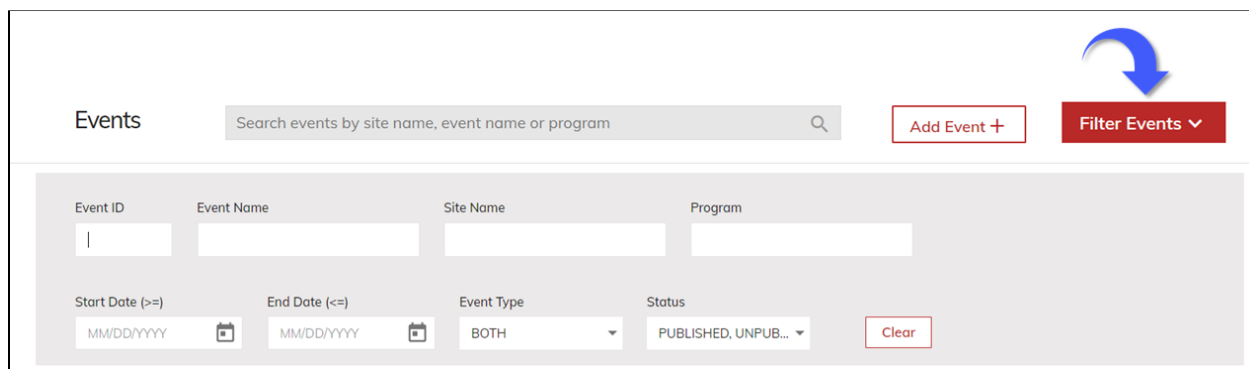


The screenshot shows the 'Events' page interface. A blue arrow points to the search bar labeled 'Search events by site name, event name or program'. The page includes a sidebar with navigation links: Call Center, Vaccine, Vaccine Group, Sites, Staff, Program, Event (highlighted), Adverse Form, and Admin. The main content area displays a table of events.

EVENT ID	EVENT	SITE NAME	PROGRAM	START DATE	PRIORITY GROUP	END DATE	EVENT TYPE	STATUS	ACTIONS
15	Private event NO call center access	Test Banner Ocotillo Medical Center one	Maricopa Operation COVID	04-08-2021		06-30-2021	PRIVATE	PUBLISHED	Delete
6	Tempe / Phoenix COVID Site	Capital Mall Parking garage Test	Maricopa Operation COVID	12-10-2020	Healthcare occupations, Other frontline essential workers, 25 Years and Older, 55 Years and Older, Adults at increased risk for severe COVID-19 disease	04-01-2022	PRIVATE	PUBLISHED	Delete

Use the Filter Events option to search by Event ID, Event Name, Site Name, Program, Start and End Date, Event Type, and Status.

- Click Filter Events and the screen below will display. Enter your search criteria. The search will begin automatically as you enter the information.



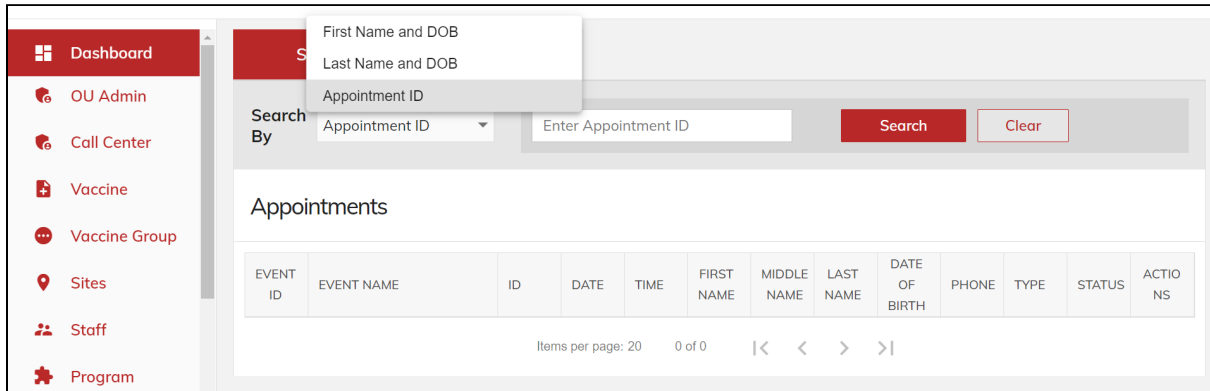
The screenshot shows the 'Filter Events' page. A blue arrow points to the 'Filter Events' button. The page includes a search bar labeled 'Search events by site name, event name or program'. Below the search bar are input fields for Event ID, Event Name, Site Name, and Program. At the bottom, there are date pickers for Start Date (>=) and End Date (<=), a dropdown for Event Type (set to 'BOTH'), and a dropdown for Status (set to 'PUBLISHED, UNPUB...'). A 'Clear' button is also present.

Note: The events table will default to active events only and closed or deleted events can be shown by using the Filter Events option.

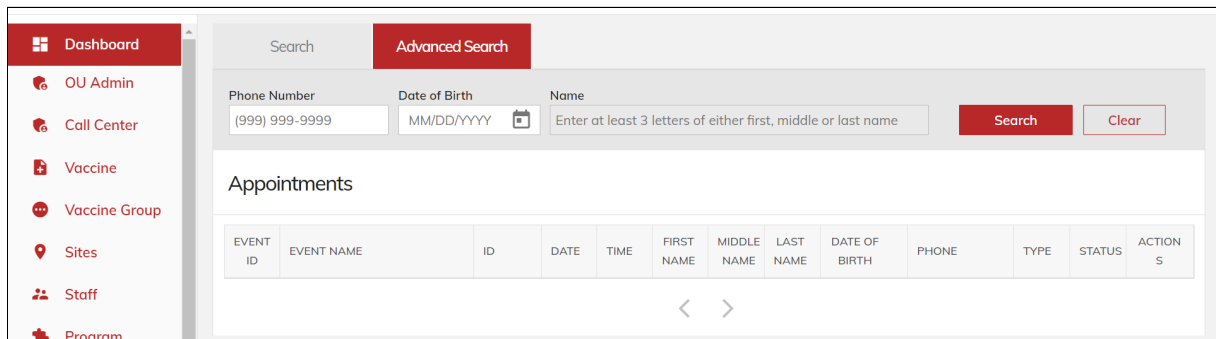
Edit a Patient's Record and View/Download Vaccination Records

OUs have the ability to edit patient records. Site administrators will need to be given access from the OU to edit patient records.

1. Click the **Dashboard** tab on the left menu bar. The dashboard will display for you to search for a patient. The standard search criteria is by: Appointment ID, First Name & DOB, or Last Name & DOB.




If you are unable to retrieve an appointment/patient info from a search on the dashboard, you have additional options under the Advanced Search tool. With this tool you can search on either Phone number or Date of Birth (DOB) and partial spellings of the patient's first, middle, or last name.



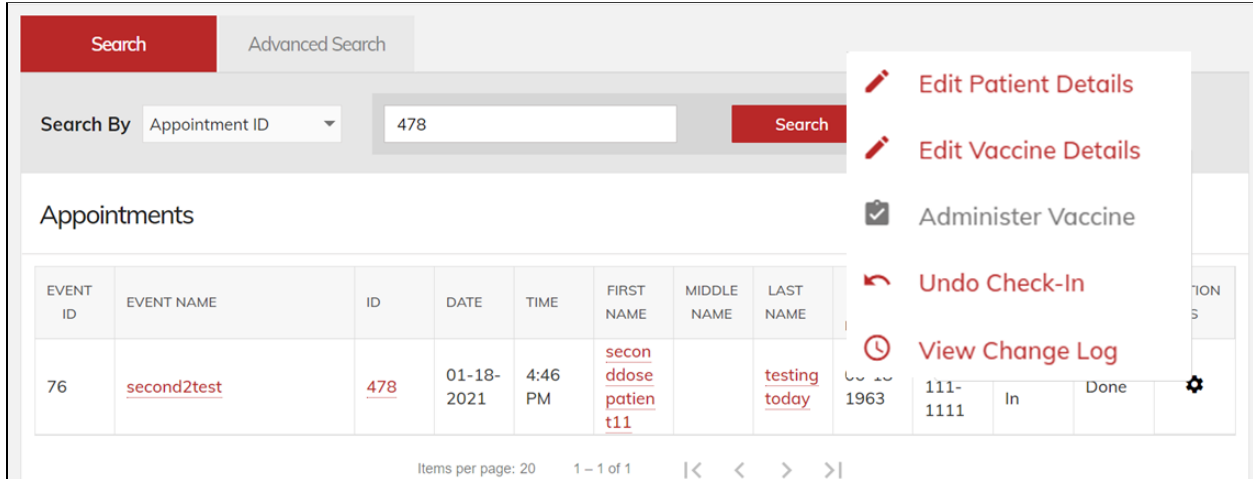
2. Once you find the patient's record to edit, click the gear icon in the Actions column.

Appointments

EVENT ID	EVENT NAME	ID	DATE	TIME	FIRST NAME	MIDDLE NAME	LAST NAME	DATE OF BIRTH	PHONE	TYPE	STATUS	ACTIONS
63	State Farm Stadium	807	02-04-2021	7:12 AM	Jane		Smith	02-01-1955	(123) 456-7890	Online	Canceled	

The following options will display: Edit Patient Details, Edit Vaccine Details, Administer Vaccine, Undo Check-in, and View Change Log.

Depending on the patient's status, some options might not be enabled. Disabled options display in grey.



The screenshot shows a search interface with a red 'Search' button and a grey 'Advanced Search' button. Below the buttons is a search bar with 'Appointment ID' selected and the value '478'. A dropdown menu is open, showing five options: 'Edit Patient Details' (pencil icon), 'Edit Vaccine Details' (pencil icon), 'Administer Vaccine' (checkmark icon), 'Undo Check-In' (undo icon), and 'View Change Log' (clock icon). Below the menu is a table of appointments. The first row shows an appointment with ID 478, dated 01-18-2021 at 4:46 PM, for a patient named 'seconddosepatient11' with last name 'testingtoday'. The table has columns for EVENT ID, EVENT NAME, ID, DATE, TIME, FIRST NAME, MIDDLE NAME, LAST NAME, and a status column. The status column shows '111-1111' and 'In'.

EVENT ID	EVENT NAME	ID	DATE	TIME	FIRST NAME	MIDDLE NAME	LAST NAME	
76	second2test	478	01-18-2021	4:46 PM	seconddosepatient11		testingtoday	111-1111 In Done

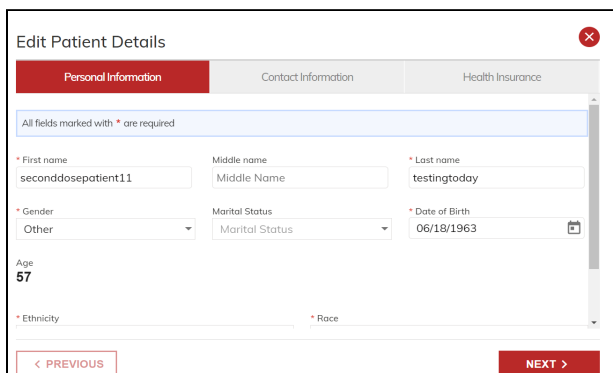
Editing Patient Details

The following categories will display when you select Edit Patient Details: Personal Information, Contact Information, and Health Insurance.

Edit information on the screens as needed. **Note:** only “walk-in” and “call-in” type appointments will have the option to edit the email address. Emails cannot be edited for appointments with the “online” type.

Note: Editing the primary phone number will uncheck the SMS notification checkbox.

Click Next to advance to the next screen when edits have been completed.

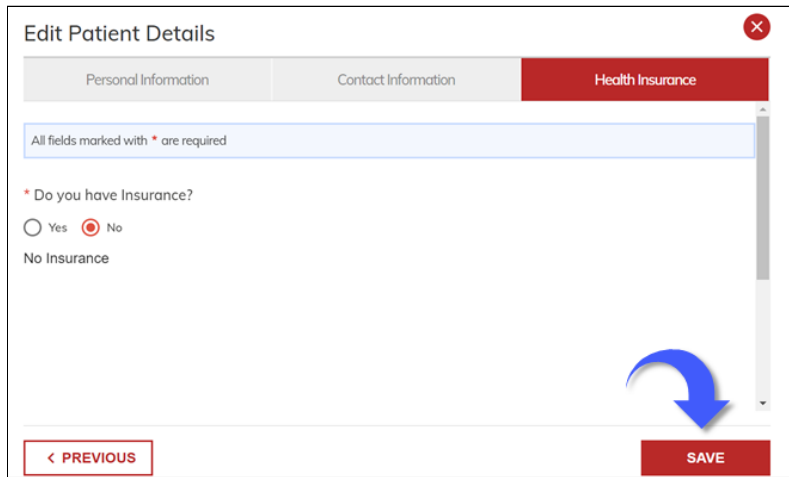


The screenshot shows the 'Edit Patient Details' form with three tabs: 'Personal Information', 'Contact Information', and 'Health Insurance'. The 'Personal Information' tab is active. It contains fields for First name, Middle name, Last name, Gender, Marital Status, Date of Birth, Age, Ethnicity, and Race. The 'First name' field is labeled 'seconddosepatient11', 'Last name' is 'testingtoday', 'Date of Birth' is '06/18/1963', and 'Age' is '67'. There are 'PREVIOUS' and 'NEXT' buttons at the bottom.

When you advance to the Health Insurance screen, **click Save** to save changes made on any of the screens.

If fields that trigger ASIIS reporting were edited throughout this workflow, an updated record will be sent to ASIIS.

Note: If insurance information is edited, changes only apply to the selected appointment and NOT checked-in appointments. They will not not apply to completed appointments.



Edit Patient Details

Personal Information Contact Information **Health Insurance**

All fields marked with * are required

* Do you have Insurance?

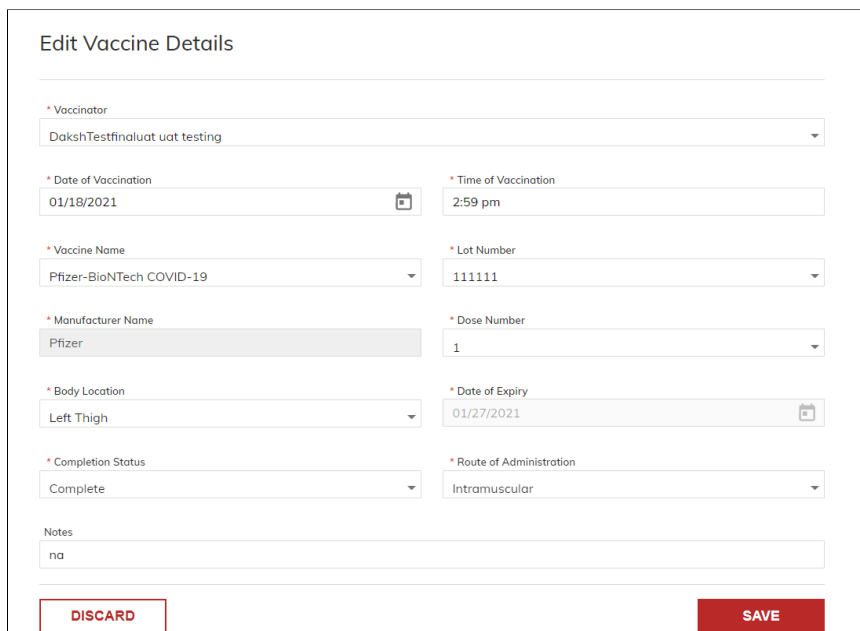
☐ Yes ☒ No

No Insurance

< PREVIOUS SAVE

Editing Vaccine Details

Edit the fields as needed and **click save** when finished. Clicking Save will trigger a delete message to ASIIS, then an add message with the new information.



Edit Vaccine Details

* Vaccinator
DakshTestfinaluat uat testing

* Date of Vaccination: 01/18/2021 * Time of Vaccination: 2:59 pm

* Vaccine Name: Pfizer-BioNTech COVID-19 * Lot Number: 111111

* Manufacturer Name: Pfizer * Dose Number: 1

* Body Location: Left Thigh * Date of Expiry: 01/27/2021

* Completion Status: Complete * Route of Administration: Intramuscular

Notes: na

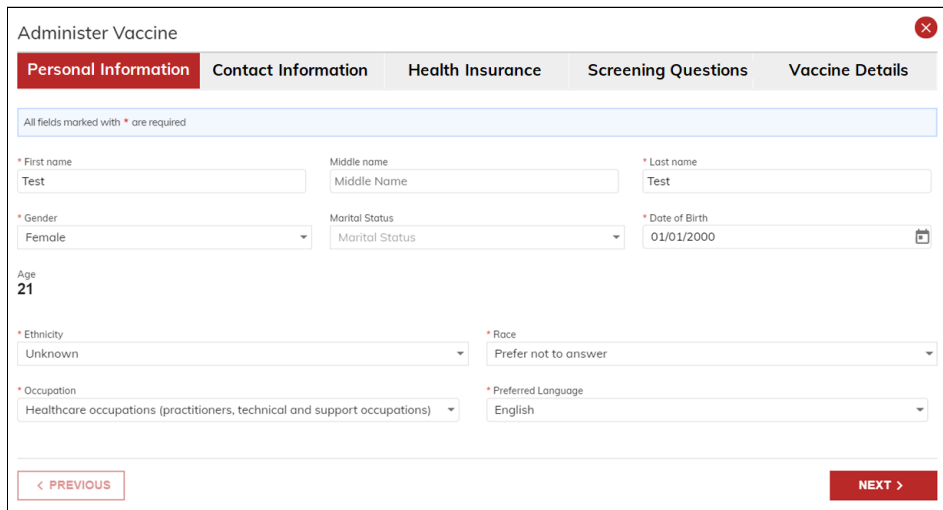
DISCARD SAVE

Administer Vaccine

This functionality would be used to document a vaccine that was administered, but not previously documented (for instance, if a patient's status was not updated correctly and was left as "Checked In, Not checked In, etc.).

Selecting Administer Vaccine will prompt a review of the patient's personal information, contact information, health insurance information, screening questions, and vaccine details.

Click Next to review information in each of the categories.



Administer Vaccine

Personal Information | Contact Information | Health Insurance | Screening Questions | Vaccine Details

All fields marked with * are required

* First name: Test
Middle name: Middle Name
* Last name: Test

* Gender: Female
Marital Status: Marital Status
* Date of Birth: 01/01/2000

Age: 21

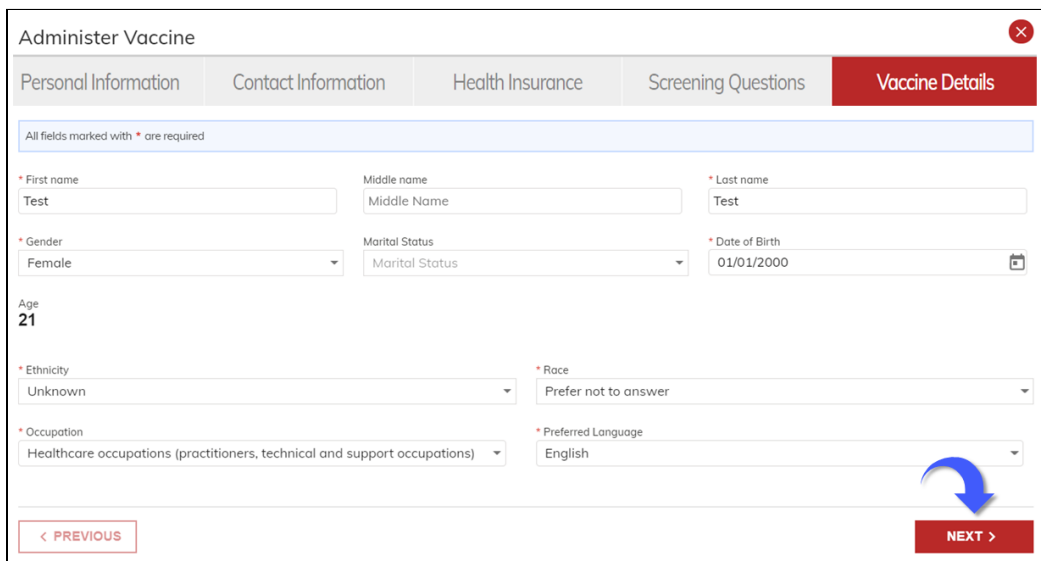
* Ethnicity: Unknown
* Race: Prefer not to answer

* Occupation: Healthcare occupations (practitioners, technical and support occupations)
* Preferred Language: English

< PREVIOUS | NEXT >

When you advance to the Vaccine Details, **enter the vaccine details** and **click Save**.

Clicking save triggers an add message to be sent to ASIIS and the appointment status will be set to Done.



Administer Vaccine

Personal Information | Contact Information | Health Insurance | Screening Questions | Vaccine Details

All fields marked with * are required

* First name: Test
Middle name: Middle Name
* Last name: Test

* Gender: Female
Marital Status: Marital Status
* Date of Birth: 01/01/2000

Age: 21

* Ethnicity: Unknown
* Race: Prefer not to answer

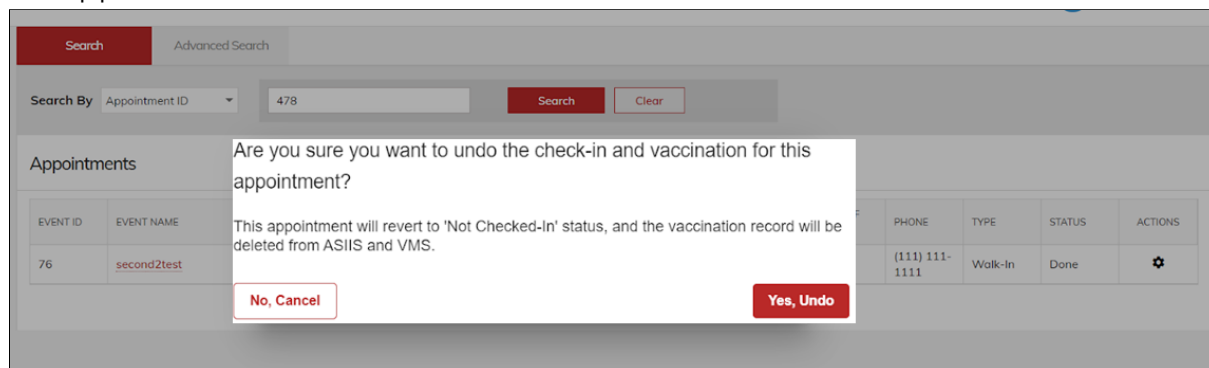
* Occupation: Healthcare occupations (practitioners, technical and support occupations)
* Preferred Language: English

< PREVIOUS | NEXT >

Undo Check-In

Click Undo Check-In when an appointment status needs to be updated from Check-in/Done to Not Checked in.

A pop-up will display asking if you are sure you want to undo the check-in status for the appointment.



Search Advanced Search

Search By Appointment ID 478 Search Clear

Appointments

Are you sure you want to undo the check-in and vaccination for this appointment?

This appointment will revert to 'Not Checked-In' status, and the vaccination record will be deleted from ASIIS and VMS.

No, Cancel Yes, Undo

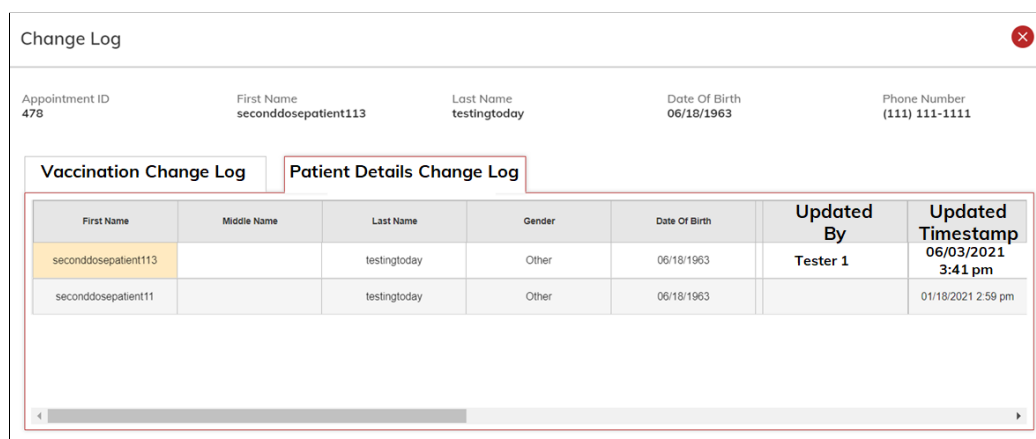
EVENT ID	EVENT NAME	PHONE	TYPE	STATUS	ACTIONS
76	second2test	(111) 111-1111	Walk-In	Done	

Note: The following fields will trigger an update to ASIIS: patient name, DOB, gender, race, ethnicity, address, guardian name, vaccine date of administration, vaccine administered, vaccine lot number, vaccine completion status, vaccine route of administration, and vaccine administration site (body site).

View Change Log

The Change Log displays changes made to vaccination details or patient details. If a field has been edited, it will be highlighted. The individual who updated the record and the time the record was updated will display.

When the 'View Change Log' is clicked, a pop-up is displayed where there are 2 tabs/sections: Vaccination Change Log and Patient Details Change Log. If a field has changed between the prior and current entry, the box will be highlighted & it will show the user who updated it and a timestamp. **For example**, in the image below, the first name was changed and hence it is highlighted.



Change Log

Appointment ID 478 First Name seconddosepatient113 Last Name testingtoday Date Of Birth 06/18/1963 Phone Number (111) 111-1111

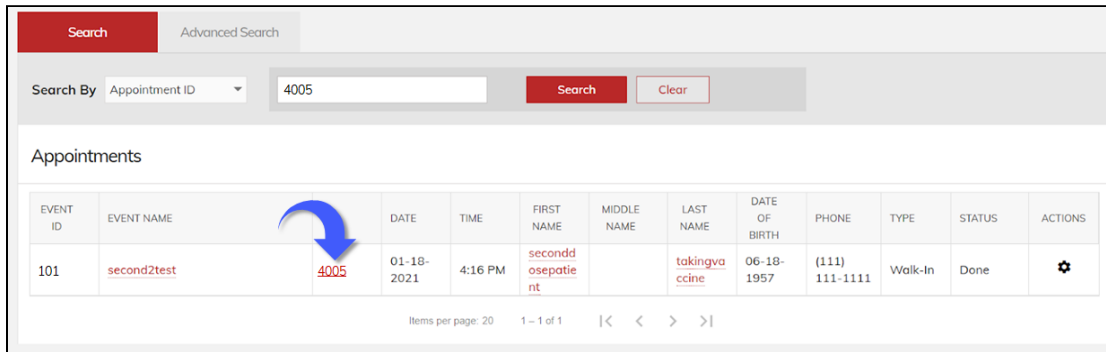
Vaccination Change Log Patient Details Change Log

First Name	Middle Name	Last Name	Gender	Date Of Birth	Updated By	Updated Timestamp
seconddosepatient113		testingtoday	Other	06/18/1963	Tester 1	06/03/2021 3:41 pm
seconddosepatient11		testingtoday	Other	06/18/1963		01/18/2021 2:59 pm

Note: This feature is not available for historical information. Therefore, there is no change log for appointments made prior to the VMS 3.0 release.

Appointment Log

Click on the Appointment ID from the dashboard to see the appointment log.



Search Advanced Search

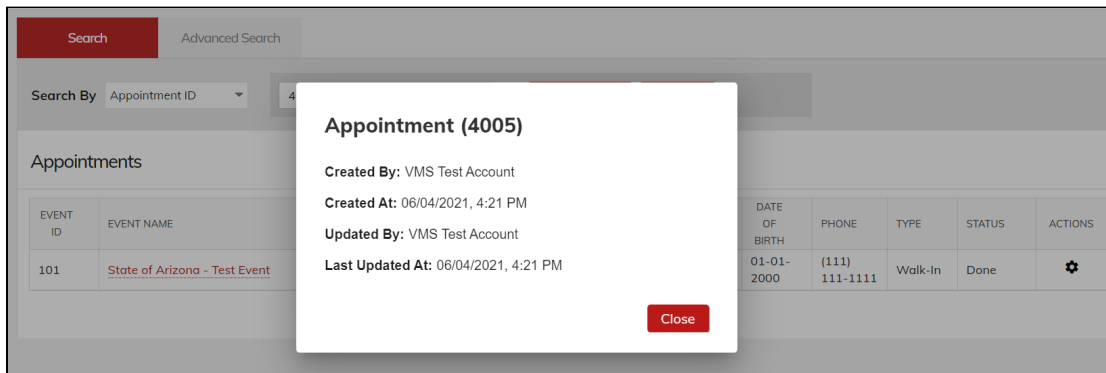
Search By Appointment ID 4005 Search Clear

Appointments

EVENT ID	EVENT NAME	DATE	TIME	FIRST NAME	MIDDLE NAME	LAST NAME	DATE OF BIRTH	PHONE	TYPE	STATUS	ACTIONS
101	second2test	01-18-2021	4:16 PM	secondd	osepatie	nt	06-18-1957	(111) 111-1111	Walk-In	Done	

Items per page: 20 1 - 1 of 1

A pop-up will display that shows who created the appointment and who updated it with the respective timestamps.



Search Advanced Search

Search By Appointment ID 4005 Search Clear

Appointments

EVENT ID	EVENT NAME	DATE	TIME	FIRST NAME	MIDDLE NAME	LAST NAME	DATE OF BIRTH	PHONE	TYPE	STATUS	ACTIONS
101	State of Arizona - Test Event	01-01-2000						(111) 111-1111	Walk-In	Done	

Appointment (4005)

Created By: VMS Test Account

Created At: 06/04/2021, 4:21 PM

Updated By: VMS Test Account

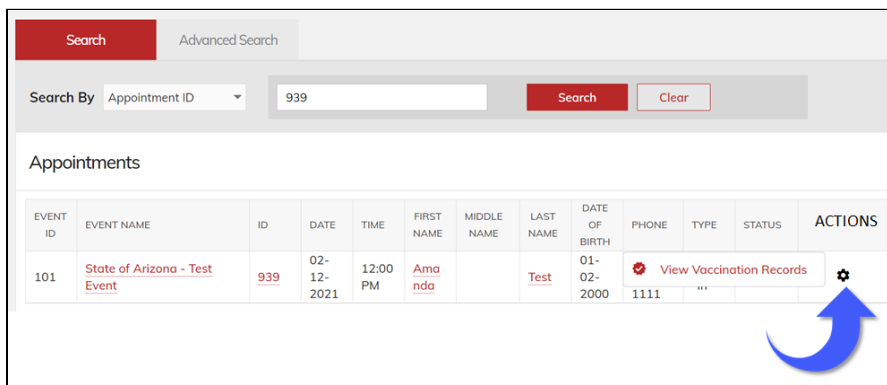
Last Updated At: 06/04/2021, 4:21 PM

Close

This concludes this user guide. If you are a Site Administrator and need assistance, please contact your Organizational Administrator.

View/Download Vaccination Records

From the dashboard, when a record is returned from searching for a patient, you can click on the gear icon under actions where an option to view the vaccination record will display.



Search Advanced Search

Search By Appointment ID 939 Search Clear

Appointments

EVENT ID	EVENT NAME	ID	DATE	TIME	FIRST NAME	MIDDLE NAME	LAST NAME	DATE OF BIRTH	PHONE	TYPE	STATUS	ACTIONS
101	State of Arizona - Test Event	939	02-12-2021	12:00 PM	Ama	nda	Test	01-02-2000	1111	**		

This will bring you to the ‘Vaccination Records’ screen to be able to download or print the record. You will have the option to print an individual record for the patient or if multiple returns display, you will be able to print or download all records.

Vaccination Records

First Name

Middle Name

Last Name

Date of Birth

Amanda

Test

01/02/2000

VACCINE NAME	MANUFACTURER	VACCINATION DATE	DOSE #	ACTIONS
Pfizer-BioNTech COVID-19	Pfizer	02/12/2021	1	<div>Download</div> <div>Print</div>

Download All

Print All

Appendix

PATIENT BULK UPLOAD INSTRUCTIONS

Patients can be invited to private events using a comma delimited(csv) file similar to the sample listed below. This sample is also available on the website under the Admin section.

Sample File

```
event_id,First Name,Last Name,DOB,Gender,Email,Street Address,City,State,Zip Code
1,Jessica,William,10/31/1994,Female,patient1.bulk8@mailinator.com,123 Main Street,Phoenix,AZ,85001
1,Samantha,Jones,11/21/1980,Female,patient2.bulk8@mailinator.com,20 Boulevard Road,Phoenix,AZ,85002
1,Mark,Jackson,11/14/1976,Male,patient3.bulk8@mailinator.com,,,,,
```

Tabular version of the sample data

event_id	First Name	Last Name	DOB	Gender	Email	Street Address	City	State	Zip Code
1	Jessica	William	10/31/1994	Female	patient1.bulk8@mailinator.com	123 Main Street	Phoenix	AZ	85001
1	Samantha	Jones	11/21/1980	Female	patient2.bulk8@mailinator.com	20 Boulevard Road	Phoenix	AZ	85002
1	Mark	Jackson	11/14/1976	Male	patient3.bulk8@mailinator.com				

Additional Instructions

1. The header information should not be changed or removed.
2. You can **only** upload a .csv and not a .xlsx file or other file formats.
3. Please make note of the event ID of the private event on the Event tab that the patients are being invited to and list it in the first column.
4. The First Name, Last Name, DOB, Gender, Email are mandated/required information. The Street Address, City, State, Zip code are optional information.
5. The address can include spaces but not commas.
6. Avoid additional spaces before or after the comma delimiters.

STAFF BULK UPLOAD INSTRUCTIONS

Staff, Clinicians and Site Admins can be added into the system by OU Admin/Site Admin using a comma delimited(csv) file similar to the sample listed below. This sample is also available on the website under the Admin section.

Sample File

First Name,Last Name,Email,Primary Phone Number,Professional Title,OU,Role

Katie,Park,staff1bulk9@mailinator.com,(541) 754-3010,Doctor,Apache,Staff

Joe,Doe,staff2bulk9@mailinator.com,(541) 754-3010,Nurse,Apache,Clinician

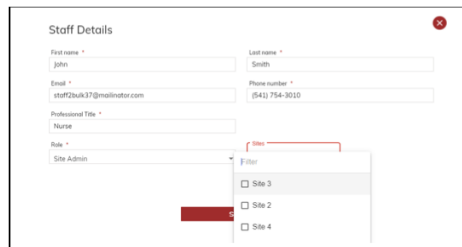
Jessica,Bulk,staff3bulk9@mailinator.com,(541) 754-3010,Medical Assistant,Apache,Site Admin

Tabular version of the sample data

First Name	Last Name	Email	Primary Phone Number	Professional Title	OU	Role
Katie	Park	staff1bulk9@mailinator.com	(541) 754-3010	Doctor	Apache	Staff
Joe	Doe	staff2bulk9@mailinator.com	(541) 754-3010	Nurse	Apache	Clinician
Jessica	Bulk	staff3bulk9@mailinator.com	(541) 754-3010	Medical Assistant	Apache	Site Admin

Additional Instructions

1. The header information should not be changed or removed.
2. You can **only** upload a **.csv** and not a **.xlsx** file or other file formats.
3. The phone number format has to be (xxx) xxx-xxxx.
4. Avoid additional spaces before or after the comma delimiter. All fields are mandated/required.
5. Site Assignment – after upload, Site Admin can be assigned to a site by an OU Admin
6. Event Assignment – after upload, staff and clinicians can be assigned to one or more events by a Site Admin or OU Admin.



Staff Details

First name *
John

Last name *
Smith

Email *
staff2bulk37@mailinator.com

Phone number *
(541) 754-3010

Professional Title *
Nurse

Role *
Site Admin

Site Admin

Filter

☐ Site 3

☐ Site 2

☐ Site 4

CALL CENTER STAFF BULK UPLOAD INSTRUCTIONS

Call center staff can be added into the system by OU Admin using a comma delimited(csv) file similar to the sample listed below. The sample is also available on the website under the admin section.

Sample File

```
First Name,Last Name,Email,Primary Phone Number,Professional Title,OU,Role,Site
Katie,Park,staff11bulk172@mailinator.com,(541) 754-3010,Doctor,Apache,Staff,
Joe,Doe,staff12bulk172@mailinator.com,(541) 754-3010,Nurse,Apache,Clinician,
Jessica,Bulk,staff13bulk173@mailinator.com,(541) 754-3010,Medical Assistant,Apache,Site Admin,Followup site
Katie,Park,c1call127@mailinator.com,(541) 754-3010,,,State Level Call Center Agent,
Joe,Doe,c2call128@mailinator.com,(541) 754-3010,,,Apache,OU Call Center Agent,
Jessica,Bulk,c3call129@mailinator.com,(541) 754-3010,,,Apache,OU Call Center Agent,
```

Tabular version of the sample data

First Name	Last Name	Email	Primary Phone Number	Professional Title	OU	Role	Site
Katie	Park	staff11bulk172@mailinator.com	(541) 754-3010	Doctor	Apache	Staff	
Joe	Doe	staff12bulk172@mailinator.com	(541) 754-3010	Nurse	Apache	Clinician	
Jessica	Bulk	staff13bulk173@mailinator.com	(541) 754-3010	Medical Assistant	Apache	Site Admin	Followup site
Katie	Park	c1call127@mailinator.com	(541) 754-3010			State Level Call Center Agent	
Joe	Doe	c2call128@mailinator.com	(541) 754-3010		Apache	OU Call Center Agent	
Jessica	Bulk	c3call129@mailinator.com	(541) 754-3010		Apache	OU Call Center Agent	

Additional instructions

1. The header information should not be changed or removed.
2. You can only upload a .csv and not a .xlsx file or other file formats.
3. The phone number format has to be (xxx) xxx-xxxx
4. Avoid additional spaces before or after the comma delimiter. All fields are mandated/required